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
USING SOCIAL MEDIA TO ADD VALUE AND GENERATE BUSINESS

Social media is an important marketing and business development tool. Lawyers and law firms are beginning to recognize that social media websites are a valuable form of branding and relationship-building. Social media is an effective means of communicating a firm’s brand in today’s online marketplace and of allowing a firm’s lawyers to establish and maintain relationships with clients and contacts.

Social media adds brand value. A firm’s brand is critical to its success, and its lawyers serve as a reflection of the brand in the courtroom, boardroom, and through their online activities. Responsible and effective social media activities can add value to the firm’s business and help generate new clients in the following ways:

- **Promote the firm and its lawyers.** News about client success stories and firm accomplishments are disseminated to a vast online community.
- **Establish lawyers’ knowledge or skills.** Blog posts, articles of interest, and news about publications and presentations help build a firm’s reputation.
- **Build a sense of community.** Potential clients want to hire firms with lawyers they know, like, and trust.
- **Highlight the firm’s values.** Social media becomes an extension of the firm’s brand.

USING SOCIAL MEDIA RESPONSIBLY

Lawyers’ personal and professional identities intersect on social media websites. They are not mutually exclusive domains. Lawyers’ personal lives and activities will undoubtedly contribute to their reputation and be attributed to their firm. As a result, they should follow this general rule: If there is anyone, anywhere, who should not see certain information, lawyers should not put it on the Internet.

**Use judgment.** Outside the workplace, privacy rights and free speech may protect any activity conducted on a personal social network with a personal email address. However, information published on social media sites should never be attributed to the firm and should not appear to be endorsed by or originated from the firm. Some tips for posting responsibly:

- **Be a team player.** If lawyers choose to list their work affiliation on a social network, they should regard all communication on that network as they would in any professional network. Even if they do not choose to mention their firm in personal online networking activity, they should remember that online lives are ultimately linked.
• **Be respectful.** Refrain from posting about controversial or potentially inflammatory subjects, including politics, sex, religion, or any questionable non-business-related subjects. Keep the tone of any comments respectful and informative.

• **Be mindful.** Whenever contributing to any online social and professional network, lawyers should remember that everything posted on a social media web site can be seen by clients, colleagues, and other members of the bar.

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**BEST PRACTICES FOR LAW FIRMS**

**Reserve the firm’s name** on the primary social media platforms before someone else does. Staking a claim early will allow potential clients to easily find a firm’s and its lawyers’ social media profiles and prevent others from usurping its name. To reserve and create social media profiles on Facebook, LinkedIn, and Twitter, follow the step-by-step instructions provided later in this *Guide*.

**Designate someone** to be responsible for creating and managing social media content for the firm. This person could be an internal or external marketing professional. We recommend the following guidelines for managing firm social media content:

• **Develop a policy.** This *Guide* provides sample policies and procedures governing social media use by lawyers and staff that can serve as templates.

• **Use privacy features.** Become familiar with privacy features offered by each social media platform to control the content and the ability for third parties to interact with the firm’s social media profiles. This *Guide* provides instructions on how to implement appropriate privacy features.

• **Redirect traffic.** The firm’s blog and web site should be the focus of its online presence. Use social media to direct potential clients, current clients, and firm contacts to the blog or firm web site.
BEST PRACTICES FOR INDIVIDUAL LAWYERS

Protect the firm. Clients, partners, and coworkers should not be cited or obviously referenced without their approval. Never identify a client, partner, or coworker by name without permission and never discuss confidential details of a client engagement. Get the appropriate permission where necessary.

Avoid making social media a full-time job. Online activities should not interfere with a lawyer’s job or commitments to clients. We recommend the following protocol:

• Set aside time. Schedule time on the calendar to interact on social media sites. This step will help you avoid constantly monitoring new messages, contact requests, and updates that can interrupt your work. Schedule as little as 20 minutes each week to as much as 20 minutes each day, whether early in the morning, during the lunch hour, or at the end of the day.

• Limit distractions. Create folders for social media email alerts in Microsoft Outlook or another email system and establish rules that automatically direct email notifications from Facebook, LinkedIn, and Twitter to specific folders. These emails can be addressed during scheduled social media time.

• Keep it simple. Lawyers using social media for the first time should not attempt to join all three social media sites at once. They should determine which social media platform(s) best suits their professional and business development needs. We recommend starting with one social media site, creating a complete profile, and interacting regularly before becoming active on another.
How-To Guide to Social Media Platforms
LinkedIn is a business-oriented social networking site with a membership of more than 50 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, and as an online resource to make introductions with mutual contacts.

The primary benefit of LinkedIn is its focus on business networking, as opposed to social interaction. On the other hand, the amount of personal online interaction between LinkedIn users is limited.

**Create a LinkedIn Account**

1. Go to [http://www.linkedin.com](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 LinkedIn** (or **Join Now**).
4. A new page will appear. Complete the necessary fields (country, professional title, 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 (firm name, title/position, city, time period with the firm, and a description of the position). Select **Save Changes**.

7. The user 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 firm's email security settings (this process may require help from the IT department). Lawyers do not have to permit LinkedIn to review the contacts in their office email accounts. Connecting the office email contact list simply aids lawyers in making quicker connections on LinkedIn.

**Completing A LinkedIn Profile**

Lawyers should follow these steps to explain who they are and what they do. After they enter 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, users can list education, past places of employment, web site addresses, personal information, etc. The amount of information disclosed is up to the user, but the requested information is generally content that would be found on a professional resumé. Users also will be given the opportunity to provide a **Summary of themselves**, which can be roughly similar to 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. Users 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.
Start Making Connections

Once users are satisfied with their profile, they should begin making connections.

1. The upper right search bar allows browsing of LinkedIn in various ways. The left side of that search bar allows users to select People, Companies, Jobs, and other categories. Users can start with People and begin inputting 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 they should look for the ones that match the present location and place of employment of the persons for whom they are searching. Selecting the names will bring up abbreviated versions of their profiles and confirm that they are people with whom the user wants to connect.

3. Once users feel 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.

4. To sign out, hover the cursor over the user’s name in the upper right hand corner. Two selections appear. Select Sign Out.

Establish LinkedIn Privacy Settings

Because LinkedIn does not solicit much personal (i.e., non-work related) information, which can in any event be omitted, there are relatively minimal privacy concerns. A profile will likely end up conveying information very similar to what a visitor to a firm’s web site would find on a lawyer’s personal page. However, if a user has privacy concerns and wishes to establish some privacy settings, hover the cursor over the user’s name in the upper right corner and a list appears. Select Settings. A new screen appears and the user has a series of privacy controls to choose from at the bottom of the screen.
LinkedIn Groups & Discussion Forums

LinkedIn allows users 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 user to see other members’ profiles, it does not automatically add all of the Group’s members to a user’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 a user to:

- Discover the most popular discussions in the user’s professional groups.
- Take an active part in determining the top discussions by commenting and “liking” comments.
- Follow the most influential people in the user’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 users to re-connect and network through forums.
- Permit a user 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 firm management, hot legal topics, or finding a Meritas lawyer that has relevant experience in a particular area.
Membership in a LinkedIn Group allows the user 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
Users can easily create their own Group for an organization or an area of interest. To create a Group:

1. Hover over Groups at the top of the LinkedIn page.
2. Select Create a Group.
3. Name the Group and upload a logo.
4. Use the pull-down menu to choose a Group Type (alumni, corporate, conference, networking, nonprofit, professional, or other).
5. Enter a brief description of the Group into the Summary that will appear in the Groups directory.
6. Enter a full description of the Group in the Description area that will appear on the Group page.
7. Enter a web site for the organization, if applicable.
8. Enter the email address for the Group Owner.
9. Users 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 user 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).

**Groups You May Like**
LinkedIn provides a Groups You May Like feature that suggests relevant Groups based on information contained in the user’s profile. To access this feature, select the **Groups** icon at the top of the LinkedIn page, and select **Groups You May Like**. A list of suggested Groups will appear.
Practice Tips for Active LinkedIn Use

The primary purpose of LinkedIn is not simply to serve as a place to post a resumé; the firm webpage already does that. It is to make and expand connections through LinkedIn’s Contacts features. By uploading a personal email contacts folder, searching in the upper right screen search box, and allowing LinkedIn to suggest people, lawyers can connect with other trusted LinkedIn users and expand their valuable professional network. Here are some tips:

✓ Notably, LinkedIn does not encourage connecting with people the user does not know. People with whom a lawyer wants to connect must affirm the request, and lawyers must accept any incoming requests before they are connected. Once people affirm a user’s request, the user will be able to see their full Profile and they will be added to the user’s LinkedIn Contacts, which can be seen by selecting the Contacts tab at the top of the LinkedIn page.

✓ A list of Contacts can act as a handy virtual Rolodex of the complete LinkedIn Profiles in a user’s network, but the real power of LinkedIn is that the user can search their contacts’ contacts for people or companies. These common users are known as second- and third-degree connections.

For instance, imagine that a lawyer is connected to George. The lawyer is aware that a company, Gadgetwhiz Enterprises, is facing a particular legal problem that he feels well equipped to handle. The problem? He does not know anyone at Gadgetwhiz. When he selects Companies from the drop-down menu next to the LinkedIn search box and types in Gadgetwhiz, he gets a search result displaying an individual’s short-form profile with a “2nd” icon by the name. The “2nd” icon indicates that this person, who works at Gadgetwhiz, is only two connections away from the lawyer. By selecting the 1 Shared Connection link that shows next to the name, the lawyer can see who that shared connection is. If that person is George, that means George is connected to a person who works at Gadgetwhiz. From there, the lawyer can either contact George via traditional means for an introduction, or select the Get Introduced link to the right of the search result profile, which allows the introduction to take place electronically and within LinkedIn.

✓ LinkedIn also has other functionalities beyond the basics described above, such as Answers, where lawyers can showcase their knowledge and expertise by answering questions.

✓ Users can upgrade their accounts by selecting Upgrade Your Account at the bottom left, which will permit users to choose from three types of upgraded accounts: Business, Business Plus, and Executive. We recommend users become familiar with the basic LinkedIn account before considering investing $20 to $100 a month for an upgrade.

✓ Additional information about advanced LinkedIn use can be found on LinkedIn’s instructional page at http://learn.linkedin.com/.
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](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.
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**.
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.
4. 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](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** ( ) . 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.
**TWITTER FOR LAWYERS**

Twitter is a real-time information and “micro-blogging” social media tool that enables lawyers and law firms to send potential clients and referral sources brief updates on what’s new with their firm. Posts are limited to 140 characters and are called Tweets. Tweets are sent in real time to any Twitter account holder who has decided to “follow” (subscribe to) the lawyer’s or law firm’s account and can include links to other web pages, such as a firm web site, blog, or article of interest.

The primary benefit of Twitter is to allow users to easily share information on their area of legal expertise, without the time-management and third-party content concerns associated with a Facebook social media profile. On the other hand, Twitter is not ideal for all lawyers because it does not allow users to create a detailed online profile and because it is a different online networking format than they may be familiar with on “traditional” social media sites.

**How to Create a Twitter Account**

1. Go to [http://twitter.com/](http://twitter.com/)
2. Select **Sign Up** on right side of the page.
3. Complete the necessary fields (name, username, password, and email).
4. Select **Create My Account**
5. Once welcomed to Twitter, select **Next** to choose accounts to follow. A list of accounts will be displayed on the bottom left of the screen. Scroll down to see what Twitter has identified as possible interesting accounts to follow. Users can follow an account by selecting **follow** opposite the description of the account. When a user is following an account, the follow button will switch to **Following**.
6. Users can also search for accounts they want to follow by using the search field at the top of the page. We suggest searching for the current Meritas accounts, which are “MeritasLawFirms” and “MeritasLI,” by entering the search term “Meritas” in the search field. Select **follow** opposite the description of each account listed after the search. We also recommend that lawyers search for clients, professional firms, professional contacts, media outlets, etc. to follow; chances are good that many of your interests, colleagues, clients, and competitors will have Twitter accounts. Users can also search by subject matter (ie., social media law).
7. Once the user has selected five accounts to follow, Twitter will continue through the setup process. If the user does not want to select five accounts to follow, or cannot find five accounts of interest, the user can select **Skip this step** at the bottom left of the screen.

8. Twitter will continue to prompt the user to enter categories of interest in such areas as sports or music to build up the accounts the user follows. The user can select the suggestions from Twitter or conduct searches on their own.

9. The next page will allow users to use Gmail, Yahoo Mail, Hotmail, AOL, or LinkedIn to search Twitter for existing Contacts who have Twitter accounts.

10. An email will arrive at the registered email address. Confirm the account by selecting the link provided in the email. After this step, users have access to their full Twitter page.

11. After following steps 1 through 10, users can send Tweets by typing a message of 140 characters or less in the field on the upper left corner of the Twitter home page (the field underneath the user name) and then selecting **Tweet**. All Tweets from followed accounts will appear on the left side of the Twitter home page.

12. To further update a Profile, users can include a photo and basic information. Select the user's name in the top left corner of the screen. Add a photo by selecting **+ Photo** in the top left corner or other Profile information by selecting **Edit Your Profile** in the top right corner. Including additional information will help others on Twitter find and follow the user.
Establish Twitter Privacy Settings

1. Although Twitter privacy settings are limited, they can be established by selecting the user name at the top left of the Twitter page.

2. A new web page will open. Select Edit Your Profile on the right side of the page.

3. Users can customize their account settings from this page.

4. By selecting the Account heading underneath the user name on the top left of the page, users can change the account settings to block other Twitter account holders from finding their account by the registered email address (emails are not publicly displayed).

5. By selecting the box opposite the Tweet Privacy heading at the bottom of the page, lawyers can limit followers to only those who are pre-approved to follow their Tweets.

6. Select Save Changes to confirm that all changes are made.

7. Select Privacy on the left side of the page (in the greyed out section below twitter) to view additional information regarding Twitter’s privacy policy.
Twitter Lists

Twitter Lists can be very useful to control the stream of information, or Tweets, the user receives on the Twitter feed. Twitter Lists allow users to organize other Twitter users into Lists that help them more easily monitor different networks of friends, colleagues, and interests. Setting up a List enables the user to view only the stream of Tweets from people included in that List. For example, users could create a List called “Meritas,” which would allow them to quickly review any Tweets by Meritas lawyers or firms without reviewing every Tweet in their Twitter feed.

Lists also allow the user to monitor a person without officially “following” that person. This can be useful if the user wishes to monitor competitors or gather specific market research.

Creating Twitter Lists

1. After establishing a Twitter account, go to the icon, located at the top right-hand corner of your Twitter home page.
2. Select the downward arrow on the icon, which will pull down a menu.
3. Select Lists, which is the second option on the pull-down list.
4. Select Create list, which is located just below your name and information:

5. A window will open with a prompt to enter List name. Type in a title for this List (i.e., Meritas Attorneys, etc.). The name of the List cannot exceed 25 characters, and cannot begin with a numerical character. The user has the option to describe the List and choose whether it is Public (anyone on Twitter can subscribe to or follow this List) or Private (only the user can access the List).
6. Select Save list. Repeat the steps in this section to create more Twitter Lists.
Adding Users to Twitter Lists

1. To add a Twitter user to a List, select the downward arrow on the icon to the right of the user’s name. Select Add or remove from lists from the pull-down menu.

2. Users can select the List(s) they want to add a person to by selecting the empty box next to the desired List(s). A checkmark will appear in the box. Once users have selected the List(s) to add that person to, they select the x at the top right to close that window. Their choices will be saved.

3. Follow the same procedure to add other Twitter users to the various Lists.

Viewing Lists

1. To view the Tweets from the group of people in the Lists, go to the user’s home page.

2. Select Lists on the left-hand side of the screen.

3. Select the desired List, and a stream of Tweets only from the members of that List will appear on the screen.
**Subscribing to Other People’s Lists**

1. To follow a List, select a user’s name until you reach that person’s Twitter home page.

2. Choose the **Lists** tab on the left-hand side of the screen, and the Lists that person subscribes to will appear on the right-hand side of the screen.

3. After selecting a List of interest, select **Subscribe** in the upper left-hand corner by the List’s title. The user is now a follower of that List.
Practice Tips for Active Twitter Use

✓ Under no circumstances should confidential information, client names, or other information that may be privileged or considered legal advice be published through Twitter. In this regard, lawyers should consult the applicable rules of professional responsibility to ensure that the content of all Tweets complies with any rules concerning confidentiality or commercial speech.

✓ To maintain an audience (a.k.a. followers), lawyers or firms should Tweet frequently. A Twitter account associated with a law firm without frequent Tweets may create the image that the law firm itself is not active.

✓ A law firm or individual lawyer should follow other Twitter accounts owned by persons/entities in the legal industry, which will generate increased awareness of the follower’s Twitter account.

✓ A law firm or individual lawyer should seek out and follow other Twitter accounts owned by clients and other professional firms related to his or her practice area, along with media outlets, and, in some jurisdictions, courts to receive information that may have an impact on a practice area or client.

✓ In the Bio section of the account profile, individuals or firms should insert a written profile of the account holder and include a disclaimer that they are not offering legal advice.

✓ A picture or logo (subject to the approval of the law firm if the logo is owned by the law firm) should be uploaded to identify the account.

✓ The background/theme of the account holder’s page may be customized to reflect the nature of the Twitter account.

✓ A Twitter badge may be placed on a law firm or individual web site so that Internet users can easily find the associated Twitter account.

✓ A law firm should designate someone to Tweet regularly. Each Tweet should be approved before being sent out by the person or persons at the firm with the authority to approve public announcements.

✓ Tweets by individual lawyers should always be written in the first person singular (“I”). References to “We” or “Our” may create confusion as to whether the individual account holder is speaking on behalf of the firm. The law firm should require that any Tweets containing information about the firm be approved by the person or persons at the firm with the authority to approve public announcements.
How To Effectively Use Social Media
INTEGRATING SOCIAL MEDIA AND TRADITIONAL MEDIA

Once a lawyer becomes familiar with how to use social media, the next step is to learn how to use these technologies effectively. Traditional online marketing activities such as firm web sites, email newsletter, and blogs are an effective and accepted way of promoting one's practice. While most lawyers and firms are comfortable with these existing online marketing activities, they are much less comfortable with interacting on online social networks. Therefore, we recommend lawyers share their existing marketing materials with their online audience on social media.

Publicizing a law firm’s “traditional” online marketing materials on social media is a powerful method to remain on the radar screen of potential clients and referral sources. Lawyers who share news, case updates, articles, achievements, and blogs with social media’s vast online community create greater exposure for themselves and their firms. They can use this opportunity to link their social media content back to the firm’s web site, where they are more comfortable promoting themselves and their practice areas. By sharing traditional online marketing activities on social media, lawyers and firms can comfortably engage with a wider online audience while at the same time directing that audience back to their existing marketing platforms.

This section will demonstrate how lawyers and law firms can quickly and easily share their content on LinkedIn, Facebook, and Twitter. While the examples will describe how blogs can be shared on social media, lawyers can replicate these methods to share any type of existing marketing material.
SHARING CONTENT ON SOCIAL MEDIA

Blogs allow lawyers to develop an in-depth analysis of legal issues to educate their client base and demonstrate knowledge on a particular subject or area of the law. Social media increases the exposure for blog content by allowing a lawyer to quickly and easily disseminate this content to a broad online audience. Once the content is uploaded or “linked” on social media, other social media users can instantly interact and share the content across the Internet.

Share Content on LinkedIn

1. To share content with a LinkedIn Group, go to Start a Discussion.

2. Insert the name of the blog article or an engaging heading in the Start a Discussion box. This heading must be 200 characters or less.

3. The user can then add additional information below the Start a Discussion box.
4. To attach a link to a firm’s blog, website, email newsletter, or other content, select **Attach a link**.

To share the comment with the Group, select **Share**. Below is an example of a recently linked Meritas article.

5. Other group members can continue the discussion by “liking” or commenting below the post.

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**Share Content on Facebook**

1. Copy the Internet URL link of the blog or other content the user would like to share on Facebook.

2. Log into the user’s Facebook Profile, and locate the What’s on Your Mind? box below the Status heading.

3. Paste the URL link in the “What’s on your mind?” box. Facebook will automatically generate a title and brief description of the user’s linked content or post. Facebook may also generate a thumbnail image from the web site.
4. Modify the heading and/or description, if desired, by selecting the text and typing in a new description of the linked content.

5. Select Share to upload the link to Facebook. Depending on the user’s privacy features, other Facebook users can comment or interact with the linked content.
Share Content on Twitter

1. Copy the Internet URL link of the blog or other content the user would like to share on Twitter.

2. Since Tweets are limited to 140 characters, the user may wish to shorten the link through a web site such as http://tinyurl.com.

3. Visit http://tinyurl.com and paste the Internet URL address into the box marked: “Enter a long URL to make tiny.” Copy the shortened URL provided.

4. Return to Twitter, select Compose new Tweet and paste the shortened URL. Describe the user’s blog post or other content in 140 characters or less (including the shortened link).

5. Consider using hash tags (#) to categorize your tweets (i.e., #Meritas or #SocialMediaLaw).

The example below illustrates how a user’s Tweet utilizes a shortened URL address to his Ohio Employer’s Law Blog and a hash tag for workers compensation (#workerscomp).
Sample Social Media Policies
**RESTRICTIVE SOCIAL MEDIA POLICY**

**Introduction**

Social media encompasses a broad sweep of online activity, all of which is trackable and traceable. These online networks include not only the blogs you may write and those to which you comment, but social networks such as Facebook and MySpace; professional networks such as LinkedIn; and the live blogging tool, Twitter. This policy is directed primarily at social media participation when acting on behalf of the Firm, participating in a manner that is directly linked to the Firm, or when using Firm equipment or the Firm domain. It is important to note that any online conduct by members of the Firm may reflect, both positively and negatively, on the Firm. Even if you participate in social media using a personal email address and there is no reference to the Firm, anything you publish can easily be tracked to the Firm.

**Purposes of Policy**

As a Firm, we believe that while access to certain online tools on Firm computers is allowed, the work we do for our clients is our utmost priority. Therefore, employees should limit time spent on social and business networking sites to appropriate times, avoid uses which do not have a legitimate business purpose, and strive to avoid uses which conflict with the professional image or policies of the Firm. While the Firm recognizes social media may be used as a supplementary marketing tool, if improperly or carelessly used it can result in negative consequences such as:

- unintended attorney-client relationships
- disclosure of sensitive client/Firm information
- defamation
- alienation of a client/potential client
- damage to professional image

The following policies are designed to provide reasonable guidance for online behavior by attorneys at our Firm while keeping these consequences in mind. These guidelines augment and enhance existing Firm policies, including the Firm’s technology and confidentiality policies.

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1 This policy is offered as a sample only and should be reviewed for compliance with applicable local laws and regulations before implementing.
Your Online Identity

When your online activity is conducted with a Firm email address and/or in a manner which can be traced back to the Firm’s domain you must abide by Firm policies, including the following:

• If you identify yourself with the Firm in any way in a particular social medium, you should regard all communications within that network as you would your communications in any professional setting and must abide by this policy.

• Be aware of the differences between your personal and professional appearances on social media. They are not mutually exclusive domains, and your personal content will intersect with your professional content. The general rule: if there is anyone, anywhere, who you would not want to see it, do not put it on the Internet.

• You are responsible for what you post. You are personally responsible for any of your online activity conducted with a Firm email address, and/or which can be traced back to the Firm’s domain, and/or which uses Firm assets. When using a Firm email address or Firm assets to engage in any social media or professional social networking activity (for example LinkedIn and Facebook), all actions are public, and you will be held fully responsible for any and all said activities.

• Outside the workplace, you have certain rights to privacy and free speech for online activity conducted on your personal social networks with your personal email address. However, what you publish on such personal online sites should never be attributed to the Firm and should not appear to be endorsed by, or originated from, the Firm. If you choose to list your work affiliation on a social network, then you should regard all communication on that network as you would in a professional network. Online lives are ultimately linked, whether or not you choose to mention the Firm in your personal online networking activity. What you say and do reflects on you, and ultimately, on the Firm.

• Obey the law. Don’t post any information or conduct any online activity that may violate applicable laws or regulations. Follow the terms and conditions of use that have been established by each site used for your social networking activities.

• Never be false or misleading in your online credentials. You MUST maintain complete accuracy in all of your online bios and ensure there is no embellishment.
Confidentiality, Privacy, and Ethics

All social media activities should comply with applicable Rules of Professional Conduct and the Firm’s established policies.

• Online conduct is subject to all of the Firm’s policies including those related to appropriate workplace conduct. Unlawful harassment and discrimination are prohibited by Firm policy. The Firm’s employment policies should be followed online as in other contexts.

• Care must be taken to avoid violating any of the Rules of Professional Conduct. Two areas that are particularly susceptible to violation within the realm of social media are rules related to confidentiality and the Client-Lawyer Relationship:
  ▸ Client confidentiality must be maintained. No social media communication should include client-specific information unless the client has first provided an appropriate written consent. Never use a client’s name in a blog posting, unless you have written permission to do so.
  ▸ Never disclose proprietary or confidential information of the Firm or any client in any form of online media. Sharing this type of information, even unintentionally, can result in loss of the trust of others and legal action against you, the Firm, and/or the client.
  ▸ Protect Firm confidentiality. Do not comment on confidential Firm information such as the Firm’s financial performance, business plans, or employment issues.
  ▸ Avoid creating unintended attorney-client relationships. Do not give legal advice online and avoid writing any content that could be construed as legal advice. Confidential information must not be solicited or received. Do not recommend a course of action. Be cautious about inadvertently creating an attorney-client relationship by giving advice or answering legal questions online; instead, focus on supplying information only. There is sometimes a fine line between legal advice and information. Responses can create a legal advice context.
  ▸ The rules of professional conduct may prohibit solicitation of legal work without a previous relationship. Do not ask for legal work without establishing a prior relationship.
Guidelines for Creating/Managing Social Media Content

- Be direct, informative, and brief.
- Do not disparage Firm clients, your current and former colleagues, other Firms, or their attorneys.
- Credit appropriately and obey copyright and fair use laws. Identify all copyrighted, quoted, or borrowed material with credit, and, if available, citations and links. When publishing any material online that includes another’s direct or paraphrased quotes, thoughts, ideas, photos, or videos, always give credit to the original material or author, where applicable.
- Fact-check your posts. Always evaluate your contribution’s accuracy and truthfulness. Before posting any online material, ensure that the material is accurate, truthful, and without factual error. Correct errors promptly; grammar and spell check everything.
- Get approval before starting a professional blog. If you would like to create a professional blog, you must receive approval from the Firm.
- When posting to a blog, refrain from posting about controversial or potentially inflammatory subjects, including politics, sex, religion, any matters related to issues where the Firm is representing clients, or any other non-business related subjects. Keep the tone of your comments respectful and informative, never condescending or “loud.” Use sentence case format, not capital letters. Stick to this maxim whenever you are contributing to any blogs or social and professional networks.
- Avoid personal attacks, online fights, and hostile communications. Do not spread rumors or gossip. Write reasonably, factually, and with good humor. Avoid any communications that could result in personal, professional, or credibility attacks.
- When using social networks with your Firm email and professional identification, do not “friend” anyone whom you either do not actually know and/or with whom you have not previously corresponded.
- Do not forget your day job. You need to make sure that your online activities do not interfere with your job and your commitments to your colleagues and the Firm’s clients.

Above all, remember that the Internet is public, permanent, and pervasive. What you write can be copied, forwarded, and used by anyone, anywhere, anytime, even in contexts you may not have intended. If you would not say it face to face with our most important client, do not say it online.
PERMISSIVE SOCIAL MEDIA POLICY

Introduction

Internet social and professional networking sites and communities (“social media”) may play a role in marketing for attorneys. These sites include social networks such as Facebook, professional networks such as LinkedIn, and blogging sites such as Twitter. In addition, blogs to which you write or on which you comment are also aspects of social media. This policy is directed primarily at social media participation when acting on behalf of the Firm, participating in a manner that is directly linked to the Firm, or when using Firm equipment or the Firm domain. It is important to note that any online conduct by members of the Firm may reflect, both positively and negatively, on the Firm. Even if you participate in social media using a personal email address and there is no reference to the Firm, keep in mind that anything you publish can easily be tracked to the Firm.

Purposes of Policy

As a Firm, we believe that when used appropriately in accordance with this policy, social media may support business development efforts. While social media may be used as a supplementary marketing tool, if improperly or carelessly used, it can result in negative consequences such as:

- unintended attorney-client relationships
- disclosure of sensitive client/Firm information
- defamation
- alienation of a client/potential client

The following policies are designed to provide reasonable guidance for online behavior by attorneys at our Firm while keeping these consequences in mind.

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2 This policy is offered as a sample only and should be reviewed for compliance with applicable local laws and regulations before implementing.
Your Online Identity

You are always personally responsible for your online activity. When your online activity is conducted with a Firm email address and/or in a manner which can be traced back to the Firm’s domain you must abide by Firm policies, including this one.

Similarly, attorneys may create profiles within social media identifying their affiliation with the Firm. If you identify yourself with the Firm in any way in a particular social medium, you should regard all communications within that network as you would your communications in any professional setting and must abide by this policy.

Firm Policies and Ethics Rules

As a basic rule, the Firm’s established policies and the Rules of Professional Conduct apply to social media.

• Online conduct is subject to all of the Firm’s policies including those related to appropriate workplace conduct. Unlawful harassment and discrimination are prohibited by Firm policy. The Firm’s employment policies should be followed online as in other contexts.

• Care must be taken to avoid violating any of the Rules of Professional Conduct. Two areas that are particularly susceptible to violation within the realm of social media are rules related to confidentiality and the Client-Lawyer Relationship:
  
  ‣ Take appropriate precautions to avoid creating unintended attorney-client relationships. Confidential information must not be solicited or received, and legal advice should not be given, without first conducting a conflicts check and opening a file in accordance with Firm procedures. Do not give legal advice on a social media web site, and be mindful that individuals may wrongfully construe your advice as legal in nature based upon your profession.

  ‣ The Rules of Professional Conduct may prohibit solicitation of legal work without a previous relationship. Be careful not to ask for legal work without establishing a prior relationship.

  ‣ Client confidentiality must be maintained. No social media communication should include client-specific information unless the client has first provided an appropriate written consent.
Guidelines for Creating/Managing Social Media Content

• Take care to protect client confidentiality. Be careful not to post any information that might divulge client-specific information. The simple fact that a client has engaged the Firm is a confidential matter not subject to disclosure. For example, it may be tempting to post a congratulatory message for a member of the Firm regarding a successful result, or to post a congratulatory message for a client on a successful transaction. Check with the partner in charge of the matter first. Also, if a hypothetical based on a client situation is presented in a post, it should not include information that would enable the client or a third party to identify the parties involved in the matter.

• Protect Firm confidentiality. Do not comment on confidential Firm information such as the Firm’s financial performance, business plans, or employment issues.

• Use disclaimers. Make it clear that your representations are representative of your views and opinions and not necessarily the views and opinions of the Firm. At a minimum in your own blog, you should include the following disclaimer: “The postings on this site are my own and do not necessarily represent the Firm’s opinions, positions, or strategies.” If appropriate, you should also disclose that your comments and statements are not legal advice, and that the reader should consult with an attorney.

• Be thoughtful. The content you create, post, and publish will be around for a long time, perhaps in perpetuity. Consider your content carefully and be judicious when disclosing information. If you have any questions or concerns about publishing a statement or opinion, first discuss the issue with the Marketing Department.

• Be yourself and be transparent. Do not use the Firm’s name to post anonymously. Be upfront and provide a disclaimer that any opinions expressed are not the views of the Firm.

• Respect and obey copyright and fair use laws. Do not use content from another source without attribution, especially when blogging. If you use images or illustrations, make sure you comply with any licensing requirements.

• Get approval before starting a professional blog. If you would like to create a professional blog, you must receive approval from the Firm. Additionally, the Marketing Department may consult with you about content, audience, protocols, and the public relations value for the Firm.

• Get approval before posting Firm-related images. Before publishing photographs or videos of Firm employees, partners, or events, you must receive approval from the Marketing Department. Any video or photographs you post should be in good taste and support a positive personal brand.
• Understanding and use of privacy settings. Understand and use the privacy settings of any social media you are using in order to guard against your information being available to others outside of your trusted network.

• Use the Front Page Rule. Do not post anything you would not want published on the front page of the local newspaper. Even privacy settings are not absolute protection against dissemination of social media communications.

• Use good judgment when using Firm resources. The Firm owns its desktop computers, laptops, software, servers, remote access servers, internet access, smart phones, and email systems. The Firm has chosen not to block the use of social media sites on Firm equipment, and expects attorneys to use good judgment in making use of the Firm’s equipment. For example, social media activities during work hours should be held to a reasonable level so as not to interfere with regular legal work. Activities that use significant internet bandwidth (such as playing video or uploading or downloading multimedia files) should be kept to a minimum and done during work hours only when absolutely necessary. Attorneys should have no expectation of privacy when it comes to the use of these Firm-owned systems as the Firm may periodically monitor its systems and equipment.

• Use good judgment when responding to or making “friend” requests. If you get a “friend” request on Facebook, or a similar invitation on another social media site, think carefully prior to accepting if the request is made by a person with whom you have a professional association. Be aware that in certain circumstances, these connections can be problematic under professional responsibility principles (e.g., social media contacts with judges or witnesses in active litigation matters) or human resources policies (e.g., personal contacts with law students who are being actively recruited by the Firm).

**Things to Avoid**

• Do not give or receive legal advice on a social media web site.

• Do not violate Firm policies when acting on behalf of the Firm or in any situation where it could be perceived you are acting on behalf of the Firm.

• Do not disparage Firm clients, your current and former colleagues, other Firms, or their attorneys.

• Do not identify clients or reveal client confidences.

• Do not create unintended attorney-client relationships.

• Be careful about “friending” attorneys junior to you or staff members. In the workplace, sometimes people in subordinate positions will feel pressured to accept the invitation.
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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