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**Guidelines for Insurance Associates Responsible**

**For Posting on Social Media Websites**

Unlike any other channel or medium, the World Wide Web has the potential to bring a brand and its identity to life.  Thanks to its unique nature as a hybrid of visuals, text and interactivity, the Web can deliver a robust brand experience and a taste of the organization-stakeholder experience through just a few screens or in a few seconds.

The potential impact of the World Wide Web on current customers, prospective customers and other Internet users makes it critical we manage our brand online.  Just as we manage and apply standards to our brand in the traditional, offline world, we intend to apply carefully developed standards to our brand online.  This will help reinforce the perception of [COMPANY’S] commitment to high standards of quality and service.

Social media is another interactive dimension to what we already doing with our website.  Social networking is a viable means to reach our customers, our agents and our third party business partners.

As new technologies and social media tools become available, these guidelines will continue to evolve.

**Social Media Approval for Company Related Social Media Activity**

1. Associates wanting to participate in social media activity must contact the Home Office for permission.
2. To obtain social media posting privileges, associates must complete a “Rules of Social Media Engagement” seminar *prior* to posting any online or social media activity on behalf of the company.
3. Once the associate has completed the educational seminar, a member of the Home Office will contact the associate to get details on which social media vehicle they would like to utilize.  The Home Office associate will set up a template for the associate along with a username and password.
4. Once approved, associates must allow the Home Office social media contact full access to social media and catalogue the required documentation.  Failing to comply will result in termination and possible legal recourse.

**Social Media Guidelines**

1. All current advertising policies apply online.  All state advertising regulations and organizational branding standards must be adhered to when posting information to the Internet.
2. All content and material (status updates, posts, video, text, copy, audio clips, etc.) posted must be pre-approved.  Associates participating in social media activity must adhere to posting pre-approved information found in the COMPANY’S social media content library.
3. All online advertising and sales material must be approved in writing by the Home Office *before* use.  This includes any modification to approved materials, as well as new material created by an associate or another source such as a colleague or third party.
4. Employees are personally responsible for the content they publish on blogs, wikis or any other form of user-generated media.  Be aware that when you publish that information it will be public.  Online activity is permanent.  Protect when the reputation and privacy of yourself, your clients and your company.
5. All activity must be business related on business only accounts.  Personal activity is encouraged but must be free from specifically mentioning COMPANY’S name, associated products and specific advice.
6. Respect propriety information, content and confidentiality.  When dealing with sensitive information use private means of communication.  Do not send unsecured, confidential customer information through the Internet.  Ask for permission to publish information that is meant to be private or internal to the company.  Abide by all copyright, fair use and financial disclosure laws.
7. Keep posts broad in topic.  If conversation moves to personal information or product specific requests, set up an offline follow-up meeting for further clarification.
8. Post appropriate disclaimers in designated, Home Office approved areas.
9. If you have questions regarding appropriate content, please contact: NAME, NUMBER AND EMAIL for assistance.

**Social Media Personal Conduct**

1. Clearly identify yourself by name and approved title when discussing work related matters.  Write in the first person to clearly identify that you are posting on your own behalf and not on behalf of the company.  A recommended disclaimer to post:

*“The postings on this site are my own and do not necessarily represent COMPANY positions, strategies or opinions.”*

1. Don’t use ethnic slurs, personal insults, obscenity, or engage in any conduct that would not be acceptable in the offline workplace.  Show proper consideration for others privacy and for topics that may be considered objectionable or inflammatory.
2. Be aware of your association with COMPANY online social networks.  If you identify yourself as working for COMPANY, ensure your profile and related content is consistent with how you wish to present yourself with colleagues and clients.
3. Honor online etiquette.  Do not type in all caps.  Don’t pick fights.  Be the first to correct your own mistakes.  And, don’t alter previous posts without indicating that you have done so.  It is important to be respectful and honest.

**Required Social Media Activity and Documentation**

Once you’ve completed the “Rules for Social Engagement” seminar and have received Home Office approval to participate in social media activity, it is a requirement to maintain the following documentation.

1. Certification of completion for “Rules for Social Engagement” seminar
2. Written permission from the Home Office to participate in social media activity
3. Screen shots of every status post, comment, response or direct message
	1. Screen shots are to be saved in the following format:

Month day year lastname media postnumber

For example: 05 21 16 smith fb p4

**Any misconduct on the web is possible cause for termination.**

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 (Employee / Agent / Associate Signature) Date

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 (Supervisor or HR) Date