

Social Media Guide



for Lawyers v. 2.0

© Copyright 2012, Meritas, Inc. All rights reserved.

DISCLAIMER: The information provided in this *Social Media Guide for Lawyers* is made available for general informational purposes only, and is not intended to constitute specific legal advice or to be a substitute for advice from qualified counsel. The information may not apply to your specific situation or jurisdiction or may be incomplete. You should not act or refrain from acting or rely on any information herein and should seek the advice of an attorney before taking any action.



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

Best Practices Guide



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 web sites 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 web sites. 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.

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.

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!

ACKNOWLEDGMENTS

The 2010-2011 Leadership Institute Class would like to thank and acknowledge **Steve Gennett** (Johnston, Allison & Hord, Charlotte, North Carolina), **Samantha Prasad** (Minden Gross, Toronto, Ontario, Canada), and **Kim Heinrich** (Meritas), without whose guidance this *Guide* would not have been a success. We also want to specifically acknowledge the following Meritas member firms for their valuable assistance and sharing of their internal firm social media materials, which directly contributed to portions of the contents in this *Guide*: Krieg DeVault; Maslon Edelman Borman & Brand, LLP; McLennan Ross LLP; Tydings & Rosenberg LLP; Bayard, P.A.; Kay Casto & Chaney PLLC; and Lowndes, Drosdick, Doster, Kantor & Reed, P.A. Finally, we would like to thank Jaffe PR, which supplied a sample social media policy that is used by many law firms as a template or guide to developing their own policies.

AUTHORS

2010-2011 Leadership Institute Co-Chairs

Heather Logan Melick

Luper Neidenthal & Logan
Columbus, Ohio USA
614 221-7663
hmelick@lnlattorneys.com

Gabriela Villagómez

Romero Arteta Ponce Abogados
Quito, Ecuador
593 2 2986 666
gvillagomez@law.com.ec

Social Media Enthusiast

Ethan Wall

Richman Greer, P.A.
Miami, Florida USA
305-373-4050
ewall@richmangreer.com

Presentation Committee

Pascal Lauzon

BCF LLP
Montréal, QC Canada
514 397 8500
pal@bcf.ca

Mark Colombell

ThompsonMcMullan, P.C
Richmond, Virginia USA
804 649-7545
mcolombell@t-mlaw.com

Michael Pagni

McDonald Carano Wilson LLP
Reno, Nevada USA
775 788-2000
mpagni@mcdonaldcarano.com

Promotions Committee

Hiromasa Ogawa

Kojima Law Offices
Tokyo, Japan
81 3 3222 140
ogawa@kojimalaw.jp

David Darden

Parker, Hudson, Rainer & Dobbs
Atlanta, Georgia USA
404 523-5300
DBD@phrd.com

Deliverables Committee

Thomas Sullivan

Lowndes Drosdick
Orlando, Florida USA
407 843-4600
thomas.sullivan@lowndes-law.com

Andrés Montoya

Posse, Herrera & Ruiz S.A.
Bogotá, Colombia
571 325 73 00
andres.montoya@phrlegal.com

Stephen Campbell

Wickwire Holm
Halifax, NS Canada
902 429 411
scampbell@wickwireholm.com



LAW FIRMS WORLDWIDE

800 Hennepin Avenue, Suite 600
Minneapolis, Minnesota 55403 USA

+1.612.339.8680 www.meritas.org

