

IIA Social Media Guidelines for Chapters

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Social computing is a way for internal audit professionals to take part in global conversations related to the work being done at The IIA and within the profession. The Institute has established, maintains, and monitors a corporate social media presence on LinkedIn, Facebook, and Twitter. The IIA welcomes chapters to also take advantage of social media and create their own presence to promote networking and share information with their members.

Unfortunately, these social media platforms do not offer the functionality that would allow IIA headquarters to host the entire network of chapters within its sites, and The Institute lacks the resources to create or manage individual chapters' social media presence. Thus, The IIA offers the following suggested guidelines for chapters to consider when establishing a social media presence or when interacting with IIA members and the general public through a social media platform. The Institute strongly encourages everyone who participates in social media using The IIA's brand to understand and follow these guidelines as well as The IIA's Code of Ethics.

Just as new technologies and social media tools continue to emerge and evolve, so will these guidelines. Therefore, chapter representatives should contact The IIA's social media team (socialmedia@theiia.org) at least annually, or visit the chapter support section of The IIA's website, to ensure they have the most current guidelines.

THE BASICS

Although there are scores of global social networking platforms, only a few hit the mark as reliable and appropriate sites for professionals. Because LinkedIn, Facebook, and Twitter are currently the most popular sites among professionals, The IIA has chosen to focus its social media efforts on these platforms. Each platform affords chapters the opportunity to interact with members and the general public in different ways depending on the content and message to be delivered.

1. [LinkedIn](#) is an interconnected network of more than 65 million professionals in 200 countries, many of whom work for Fortune 500 companies. LinkedIn is the best social media platform to stimulate discussions about the chapter as well as the internal audit profession. Chapters should view LinkedIn as a member-driven forum where members can post questions and items of interest to internal audit professionals and submit feedback about the chapter and The IIA. However, [designated group managers](#) should not take an entirely hands-off approach; rather, you should post thoughtful discussion topics, monitor the discussion board for appropriateness, and chime in with answers to questions or guidance suggestions.
2. [Facebook](#) is geared toward helping people communicate more efficiently. The platform currently has more than 400 million active users, half of whom log on to the site at least once a day. Facebook allows chapters to be more animated and casual when interacting with fans/group members. One example of how chapters can leverage Facebook is by setting up a chapter group or fan page and posting upcoming chapter events to the events tab, which allows group members/fans to RSVP, comment, post photos, and download the event to their calendars.
3. [Twitter](#) is a real-time microblogging service that allows users to stay connected through "tweets," up to 140-character messages. Currently, there are more than 75 million Twitter users. Twitter is the most casual and real-time platform of the three. Chapters could use Twitter to announce — and remind members of — registration deadlines, drive followers to the chapter's website, or post relevant hot topics or news, among other items.

BEST PRACTICES

To succeed in social media efforts, there are some general best practices that chapters should keep in mind. *Above all else, chapters **must** recognize that social media provides an environment for conversations and engagement.* Therefore:

- All content should be informative or educational (refer to [“Add Value”](#) below). When drawing attention to a new product or service, being pushy or overtly “salesy” in messaging and communications will not be well received. These types of posts would dominate the discussion area and discourage members from visiting the group. Instead, provide the kind of information that facilitates choices that *lead to sales*.

For example, an inappropriate post would be: “Plan to Attend the IIA-Generic chapter’s Latest, Greatest Event.” Rephrase the post to add value while simultaneously sharing your message: “According to recent IIA research, internal auditors are moving away from a compliance focus toward an operational focus. Well-known expert, Sam Smith, a speaker at the upcoming Latest Greatest Event, says this is a mistake and could result in more regulatory violations.” (This post would offer the opportunity to hyperlink the Latest Greatest Event to its corresponding IIA Web page.)

- Provide and encourage appropriate content (e.g., announcements of internal-audit related blogs, articles, guidance, research, and news from IIA conferences, seminars, and speakers).
- Discourage and delete inappropriate content or content posted by non-IIA parties who are announcing or promoting products, seminars, conferences, or anything “for sale.” Also, any “free” products or events posted by non-IIA parties should be deleted. You may want to consider blocking participants who do not follow this policy. (See [“Terms of Use/Disclaimer”](#) below.)
- Monitor group discussions and contribute to conversations generated by members or fans. (Refer to [“Be a Leader”](#) and [“Designating Group Owner, Managers, and Moderators”](#) below.)
- Do not limit the number of posts; rather, encourage posting on a regular basis. Also, be mindful of ensuring that there is an appropriate mix of pure message versus marketing-focused communications.
- Depending on the resources available to manage your social media efforts, IIA chapters may want to pick one of the social media platforms on which to focus. IIA headquarters finds that LinkedIn is its most prolific social media platform with more than 15,000 members compared to 1,000 Facebook fans and 500 Twitter followers.

GUIDELINES FOR COMMUNICATING VIA SOCIAL MEDIA PLATFORMS

The following principles apply when communicating online and associating a chapter with The IIA. They are also good practices to keep in mind for any type of communication.

BE TRANSPARENT. Your honesty — or dishonesty — will be quickly noticed in the social media environment.

- If you have a vested interest in something you are discussing, be the first to point it out.

BE JUDICIOUS. Make sure your efforts to be transparent don't violate The IIA's privacy, confidentiality, and legal guidelines. Be smart about protecting yourself, your privacy, and confidential IIA information. What you publish is widely accessible and will be around for a long time, so consider the content carefully.

- All statements must be true and not misleading, and all claims must be substantiated and approved by the appropriate party.
- Never publish or report sensitive information that is meant to be private or confidential without express permission from the involved parties.
- Never comment on anything related to legal matters or any parties with whom The IIA is engaged in litigation.
- Never share proprietary IIA information about business plans, strategies, pending partnerships, or intellectual property that would hinder or damage The Institute's reputation, market position, or competitive advantage.
- Know and understand the definitions and liabilities of *libel* and *slander*.

WRITE WHAT YOU KNOW. Make sure you write about your areas of expertise. Remember, you are personally responsible for the content you share.

- If you are writing about a topic in which The IIA is involved but you are not The Institute's expert on the topic, make this clear to your readers.
- Be careful not to violate brand, trademark, copyright, fair use, and confidentiality laws.

BE CONVERSATIONAL. Talk to your readers like you would talk to real people in professional situations.

- Avoid overly pedantic or "composed" language.
- Bring in your own personality and say what's on your mind.
- Consider content that's open-ended and invites responses.
- Encourage comments.
- Broaden the conversation by citing others who are posting about the same topic.

ADD VALUE. Social communication from chapters should help your members, partners, and co-workers.

- It should not be a hard and direct sell.
- It should start a conversation.
- It should be thought-provoking and build a sense of community.
- It should help internal auditors improve their knowledge or skills, build their businesses, do their jobs, solve problems, or better understand The IIA.

BE A LEADER. There can be a fine line between healthy debate and incendiary reaction. Respect your audience. Be careful and considerate. Once the words are out there, you can't take them back; and once an inflammatory discussion gets going, it's difficult to stop.

- Do not denigrate your members or The IIA.
- Do not use or allow ethnic slurs, personal insults, obscenity or engage in any conduct that would not be acceptable in a professional workplace.
- Do not respond to every criticism or barb.
- Frame what you write to invite differing points of view without inflaming others.
- Show appropriate consideration for others' privacy and for topics that may be considered objectionable or inflammatory — such as politics and religion.

BE AN IIA BRAND EVANGELIST. Just like your conversations at a dinner party, conversations in social media communities are an opportunity to educate niche audiences about the internal audit profession and The IIA. The more familiar you are with The IIA's and the internal audit profession's value proposition, the better equipped you will be to be a responsible steward of The IIA brand.

- Regularly read IIA publications such as *Internal Auditor* magazine and *IIA Today*.
- Regularly visit The IIA's website as well as its [presence on social media platforms](#) to stay updated on IIA happenings, products, and services.
- Never guess or pretend to know about something that you're not familiar with.

ADMIT MISTAKES. If you make a mistake, admit it.

- Be up front and quick with your correction. If you're unsure of how to correct the mistake, ask The IIA's social media team (socialmedia@theiia.org) for guidance or consult the platform's help section.
- If you are modifying an earlier post, make it clear that you have done so.

IF IT GIVES YOU PAUSE, PAUSE. If you're about to publish something that makes you even the slightest bit uncomfortable, don't click "submit."

- Take a minute to review these guidelines and correct what's bothering you.
- If you're still unsure, discuss it with a member of your board, call IIA headquarters, or e-mail The IIA's social media team (socialmedia@theiia.org) for guidance.
- Ultimately, what you publish is yours — as is the responsibility. Keep in mind that what you say and write can affect the image and credibility of The IIA.

IF CONTACTED BY THE MEDIA, DEFER. Make sure to refer any contact with the media to your chapter's board president. Only authorized IIA staff and volunteers may make comments or provide information to the media.

ADDITIONAL REQUIREMENTS

KEEPING HEADQUARTERS UPDATED. All chapters that decide to create social media groups, fan pages, and/or feeds must notify headquarters by sending an invitation to join or by e-mailing a link to The IIA's social media team (socialmedia@theiia.org). This information will be used for tallying IIA-affiliated groups, gathering research, and compiling best practices for future social media efforts.

LINKEDIN JOBS TAB. LinkedIn allows groups and subgroups to include a job tab within their profile. IIA headquarters has disabled this tab because it is in direct competition with The IIA's career center on The IIA web site. IIA chapters with a LinkedIn presence may also want to consider disabling this feature if it competes with any job posting offerings on your chapter's website. Chapters can disable the job feature by clicking on the "Manage" tab within their profile. Under "Edit Group Settings," verify that the "Enable the Discussions and News features" box is checked, and uncheck the "Enable the Jobs Feature" box. For more information about disabling the job tab, contact The IIA's social media team (socialmedia@theiia.org). Recruiters frequently post open positions on social media sites. If you find this practice to be competing with your chapter's job posting offerings, or if it becomes disruptive to your social media effort, you may want to consider warning the recruiter or blocking them from participating in your group.

MEMBERS ONLY? OR OPEN GROUPS? IIA headquarters has decided to allow anyone who is interested in internal auditing or The IIA to become members, fans, and followers of its social media groups. Chapters should consider whether they want to follow the same model or close its group participation to members only. Keep in mind, however, that closed groups must develop a member verification process which may or may not be possible regarding the availability of resources to manage your social media efforts.

TERMS OF USE/DISCLAIMER. The Institute recommends that chapters use a modified version of the following terms of use/disclaimer language on their group's LinkedIn and Facebook profiles. For LinkedIn, chapters also should consider including this language in a discussion board post and making it a "featured discussion" so it will remain at the top of the board.

Members of the IIA-*[insert chapter name]* chapter's *[choose one: group/fan page]* are encouraged to share information and experience, network with peers, and ask questions about the chapter and the internal audit profession, as well as IIA-related topics.

Group members who engage in overt recruiting or commercial or promotional discussions, as well as posting unrelated information, will be banned from the group and their discussions will be deleted immediately. **For career opportunities or to post a job opening, visit The IIA's Career Center: <http://www.theiia.org/careers/>.**

Group moderators also will ban members who display inappropriate behavior such as explicit sexual, racist, defamatory, or other socially unacceptable behaviors.

Have fun, share knowledge, and get engaged!

DESIGNATING GROUP OWNERS, MANAGERS, AND MODERATORS. The IIA recommends setting up a general chapter e-mail address (e.g., Gmail or yahoo.com) and using it to establish a username and password when creating the chapter's presence on social media platforms, particularly LinkedIn. This procedure will facilitate a smooth transition of "ownership" to future chapter members designated to manage the social media effort.

If chapters encounter critical or confrontational posts or comments within their social media sites, a thoughtful, open-minded, and nondefensive response should be crafted. The chapter should ideally identify one spokesperson, typically the board president, to respond. It is unnecessary for multiple board members or chapter representatives to post responses. Keep in mind that social media is intended for authentic conversations and is an opportunity for the chapter to gain feedback. If a participant posts abusive or defamatory remarks, the participant can be blocked. However, mere discourse should not be grounds for dismissal from participation in the groups or on the pages.

In LinkedIn groups, the group owner can promote up to six group members to manager status and up to 50 members to moderator status. The owner also can change or revoke these promotions if necessary. More information about [manager](#) and [moderator](#) statuses is available from LinkedIn's help section.

GETTING HELP. Due to the high participation rate of IIA chapters in social media platforms, The IIA's social media team may not respond immediately to help requests. The social media platforms' built-in help section and user forums will address almost any problem or question you may encounter: [LinkedIn help](#), [Facebook help](#), [Twitter help](#).

FINAL THOUGHTS

In addition to being effective vehicles for communicating with chapter members and other internal audit professionals, social media can be fun. Being mindful of these suggested guidelines and best practices can help chapters create an effective, informative, and enjoyable way for individuals to connect with The IIA.

Always remember that online social media platforms can blur the lines between public, private, personal, and professional. Just by identifying yourself as an IIA member, you are creating perceptions by other members, volunteers, and the general public about your expertise and The IIA. If you are associating yourself with The IIA through an online presence, be sure that all content associated with you is consistent with your experience and with The IIA's code of conduct, values, and professional standards.

The IIA encourages chapters to regularly visit The Institute's groups, fan pages, or feeds on social media platforms for posting and discussion examples and guidance. The direct links to each site are:

- **LinkedIn Group:** <http://www.linkedin.com/in/theiia>
- **Facebook Fan Page:** <http://www.facebook.com/TheInstituteofInternalAuditors>
- **Twitter Feed:** <http://twitter.com/TheIIA>