

The Secret Underground
Guide to Social
Media
for Organizations *

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Introduction

How do you do it? How do you bring a spirit of innovation and experimentation to the communications shop of a large organization?

I've worked in a large organization – the government – for the last ten years. You can find bright, creative and resourceful people around every corner, in every department.

During the course of their careers, many of these people have thought of a move that could improve their work or their environment.

From experience, we all know that small changes in process or presentation are easily won. After all, it's just another line on an approval sheet, or a tweak on the website.

Large organizations can also be convinced to launch a large-scale overhaul of their systems – whether it's a supply chain, assembly process or online order system.

But it's a real pain to get them to rethink their relationship with humans outside the security fence. After all, our customer service reps seem to be doing a good job, right? That sales force really does have a handle on the needs of the community, doesn't it?

In speaking to hundreds of workers and managers for large organizations (government and private sector), I've been asked the same questions, over and over:

- How do you convince your boss to even experiment with social media?
- Doesn't it mean a lot of extra work?
- Isn't this sort of stuff blocked by our organizational policies?

This *Secret Underground Guide to Social Media for Organizations* is meant to help you answer some of those questions.

Social media doctrine

During the breakout years (1999 – 2005), many evangelists and true believers insisted that social media required honest and open *conversation* between the author and the reader/listener.

This was a tremendous obstacle for most organizations. As some bloggers have argued, corporations and governments are not really prepared to have a frank dialogue with their clients.

The idea that corporate communications shops may want to stop and listen was a GIANT hurdle to leap for imaginative communications types looking to try out new tools.

Luckily, the environment has changed in the past 24 months. More corporations – and even governments – are experimenting with social media.

And some have been doing it quite badly. That has set the bar quite low for the rest of us. (Just kidding!)

Instead, the audience has broadened. More demographic groups are now represented online, and they have varying expectations for what social media can actually accomplish as a tool for conversation and consultation.

In fact, many clients and citizens active online are simply startled to find large organizations and governments taking an active interest in their opinion.

In this short guide, I propose several general activities you can follow to:

- use social media on your own
- adapt social media tools to your work environment
- convince your supervisors to support social media work

The key? Don't let your imagination and enthusiasm be dampened by organizational politics or institutional caution.

Want a good body? Work at it. Want to be a success? Work at it. Want to be truly exceptional? Be a touch insane...You need a little bit of insanity to do great things.

Henry Rollins

Look for weaknesses in your organization's existing practices, maximize your advantage, and create the opportunities to argue for new technology.

An important caveat: it may be hard to push for change if your online reputation is *at all* muddied: a history of indiscrete Usenet postings, a strange flickr photoset, flame wars or – god forbid – outright banishment from online communities may just sabotage your efforts.

Guerilla Warfare

Take the fight to the hallways. The kitchenette. The copy room.

Step by step, experiment with new communications tools to undermine the existing and possibly stale frameworks that dominate your organization's work in media analysis, strategic planning, stakeholder outreach and media relations.

Create situations that provoke managers and executives to question the assumptions and conventions that dominate their sometimes knee-jerk choice of tactics and strategy.

I subscribe to the law of contrary public opinion... If everyone thinks one thing, then I say, bet the other way.

Ricky Roma

Along the way, build your personal capacity to wield new tools in innovative and possibly disruptive ways.

Surprise your constituency – you know, actual citizens – by becoming more approachable, more interactive and more localized.

Focus on opportunities, not obstacles

We think too small, like the frog at the bottom of the well. He thinks the sky is only as big as the top of the well. If he surfaced, he would have an entirely different view.

Mao Tse Tung

Operate as a cell

Separate your initial exploration of social media from the everyday drudgery of your communications or marketing life.

The goal here is to build personal awareness and expertise in social media, while keeping an eye open for opportunities and advantages for your organization.

You will be experimenting with different tactics and online applications, but it's best to work alone.

As you make your first forays into the thicket of apps like flickr, twitter, Blogspot, del.icio.us and Facebook, you are likely to stumble and fall.

And you don't want to prompt concern – or criticism – at the office. Not just yet.

Train with another brigade

Luckily, there are plenty of places to get your boots wet, so to speak. The inhabitants of the social media universe are largely friendly, and you will rarely fall into a pit of poison darts.

First of all, get used to reading blogs and online news sources. Find one blog that appeals to you, whether because of its content, its style, its humour or its imagery. Click through to other blogs on its blogroll to find similar content. Listen to podcasts. Dig right into content related to your hobbies, your current job or the job you would like to have.

Comment. Contribute. Experiment, damn it! This whole exercise is about getting you out of your comfort zone!

I tell you, we are here on Earth to fart around,
and don't let anybody tell you different.
Kurt Vonnegut

Identify fellow travelers

Think about your job. Think about the job you would like to have.

Break it down by its functions. Media analyst. Consultation expert. Community relations manager. Graphic designer. Strategic planner. Polling analyst.

There are sizeable communities online for each of these functions ... but maybe you should start to think of them as professions.

That means there are countless resources available online to help you develop as a communications professional, let alone build an identity as a social media evangelist within your own organization.

Marshal external support

You're not alone. Definitely not alone.

Ten years ago, the *Cluetrain Manifesto* helped articulate the basic principles underlying concepts like cooperation, and conversation.

There are acolytes, evangelists, and thought leaders in every corner of most large organizations – and in municipal, provincial, state and federal governments around the world.

You don't have to redraw the map when it comes to implementing social media. As a civil servant, I'm particularly interested in how social media can be rolled out in government departments.

There are experts in Canada, the United Kingdom, New Zealand, the United States and elsewhere who have spent years trying, stumbling, and eventually succeeding in launching blogs, podcasts, online consultations, wikis, twitter feeds, online videos and other tactics.

These people are, for the large part, extremely approachable. Not only are they willing to share their experiences, but they seem to obsess with finding new ways to communicate: email, AIM, Skype, twitter, utterz ... they just can't stop oversharing.

At home, find friends and build alliances

Find examples of social media by searching the corners and back alleys of your organization's presence online.

That's where you'll find other adventurous and innovative communications, marketing, community relations and social media fans willing to sneak a tactic or two out onto Main Street for a test drive.

Compile a list of the various social media tactics already deployed across your organization – or your government.

Speak to the authors and sponsors of these tactics, building short case studies that detail their goals, the results of their efforts and what they consider organizational benefits and costs of their new tactics.

Develop an informal social network to encourage communication among these fellow guerillas.

The keys to any truly successful social network are ease of use and accessibility. You want to choose a tool – like email listservs, a wiki, or even a Yahoo group – that all of your group will be able to use.

There is no point in hampering communication by requiring your erstwhile allies to sign up for new gimmick networks or learn new interfaces. Make it easy to communicate, and the relationships will grow.

With their help, you'll be able to demonstrate that social media is being used elsewhere with little impact on stability: that will strengthen your argument for implementing new social media tactics in your own organization.

You'll be able to share successful strategies for identifying, selling and implementing social media tactics - as well as alert each other to planned policy changes that could affect your efforts.

Just as any large organization depends upon consistent and evenly-applied rules and policies to maintain stability, you need to reassure decision makers and executives that your tactics do not pose an unmanageable risk.

When faced with reluctant or conservative decision makers, there aren't many better opening gambits than "well, *they're* doing it."

Pull a Kissinger

Want to move your organization out of the 90s? Work the backchannels. Identify other employees who are open to new ideas and already experimenting with new technologies.

Search online networks like LinkedIn and Facebook for the digital breadcrumbs of colleagues, senior managers and key gatekeepers in your organization.

With this information, you can try to build a personal relationship, built on a common interest in new technologies.

The organization has a lot invested in the status quo. Any challenge can be met with resistance, ridicule or outright sabotage.

By establishing a backchannel relationship with colleagues and managers, you'll be preparing the ground for your eventual push in favour of implementing social media tactics.

Exploit weaknesses in the hierarchy

Well, I don't mean hack the system. But close.

Even if your organization has blocked access to all web addresses with even a hint of social media flavouring, you can still access all that tasty content with a few shortcuts.

The biggest shortcut? Experiment at home. At the library. If desperate, just stare over someone's shoulder down at the coffee house.

As a first step, sign up for a stable and free email account outside your firewall.

Second, sign up for new media email lists and newsletters from Poynter, Harvard, Wharton, Mediapost, and others. Set up a wide range of Google Alerts and sign up for accounts on cool new tools like Twitter.

Then, funnel all your messages through that email account.

Why? Deniability and portability. Access to all your information is guaranteed if it is hosted on an independent system, no matter what a system administrator or floor tech decides about the apps you can install on your desktop.

(Hint: I've noticed that a lot of places block the old-school sites, like Hotmail, but leave Gmail alone.)

If you decide to try out some new tools at work, but want to avoid messing up your desktop with new apps, equip yourself with the road warrior's backpack: a thumb drive loaded with portable and open source versions of valuable applications (found at portableapps.com).

If you're looking to work off the grid, the apps on a BlackBerry can help you dig into social media without breaking your organization's IT policies.

If you're really desperate, why not bring use an iPod Touch to hack the wifi set up by the company upstairs?

Another ally is an online aggregator - a site where you can pull together your online email, favourite RSS feeds, news feeds and even your local weather – like iGoogle or Yahoo. You can usually access these sites inside a networked environment.

Sneak social media over the fence

You don't need large scale projects to integrate social media in your office. There are plenty of opportunities to sneak it into your everyday work – in the process building familiarity and trust among your colleagues and managers.

Stakeholder tracking

Your colleagues in the strategic management unit are already tracking the research conducted by think tanks, key academics and issue advocates.

Find your opportunity. Any academic worth their salt is already developing an online identity. This may mean posting research and essays on their faculty web site. It may mean their latest presentations are featured on conference blogs or posted on slide-sharing sites.

Or, god forbid, they have an active blog.

Whatever it is, include that material in your media monitoring.

When you come across controversial essays or blog posts, send them to your communications managers, clients and relevant decision makers by email – and make sure to add a few sentences of context and analysis to explain the source and its influence.

Find video and audio recordings online - even podcasts - and distribute them as well.

Highlight their work in your media analysis. Single out this group for special attention in the public environment section of your communications strategies.

Media analysis

Choose your media clips carefully, making it a habit to include the online version of print coverage. Often, the online version will have comments from readers - make sure to include these comments in your paper package and your electronic distribution. In your analysis, highlight how the comments add (or subtract) from the debate.

Issues and crisis management

What's better than working a client through a ground shaking crisis? Avoiding it altogether.

With the practiced analysis of online sources, you can identify social irritants, political complications, economic shudders and consumer unrest before they blow you over.

How? As part of your reconnaissance, find the message boards, blogs, email lists and event organizing sites that touch on the issues important to your organization.

As many corporations are discovering, even a small group, formed on Facebook or Bebo can buffet a large ship.

Event monitoring

Are your clients interested in an important event - a conference, a seminar, a news conference? Maybe your clients are participating, or even presenting.

Use online tools to monitor the event, track the immediate reactions from others in the field and measure the online ripples created after the event.

Feed this back to your clients, as they continue waste hours at the event.

Even better, use online tools to distribute the results of your tracking.

Instead of sending off a series of emails and links to your colleagues and clients, create a del.icio.us page to aggregate links to the information you find.

You'll be demonstrating the value of using social media tools to track the impact of online activities, all while providing intelligence for your clients.

Co-opt the familiar

I'm sure there are communications and marketing activities already underway in your organization that can be co-opted and redesigned to fit common social media templates.

What about public service announcements? Really, they're podcasts in a more boring and less interactive format.

Has your organization worked on a social marketing campaign in the past few years? The public awareness materials that were developed can be re-applied to an online campaign.

Do you have a public speaking program? Why not record the particularly interesting speakers (save us from the pedantic and boring ones) and make the video available online?

Score propaganda wins

As you become comfortable, seek out opportunities to test yourself and stretch your knowledge:

Sign up for local events (like Third Tuesday). Look for conferences – close and afar – that will dig into how social media can be applied to your work environment.

Speak up. Schmooze during the health break. Perform the ritual exchange of business cards (but make sure yours have a cool logo and funky colour).

"You can make more friends in two months by becoming interested in other people than you can in two years by trying to get other people interested in you."

Dale Carnegie

Back at home, prepare notes and reports for your office colleagues and supervisors. Offer to provide briefings on cool new tools at staff meetings.

If you're lucky, your socializing activism may result in invitations to speak at other conferences (*here's a secret: there's nothing a*

conference organizer likes better than an entertaining speaker willing to fill a last minute cancellation).

Leapfrog the dead weeds

If you're the particularly daring sort, you could even try to leap the layers of management reluctant to experiment with new technologies.

It's a dangerous move, but it appears that senior executives are beginning to understand the appeal and potential benefit of a limited social media campaign – if only to convince potential recruits that their organization isn't firmly stuck in the 80s.

Develop an elevator pitch in favour of using social media in your organization, just in case you come across a big wig in the hallway, riding the elevator, or at a reception.

Call in the big guns

Take a page from your colleagues in marketing, and hire an outside consultant to validate your ideas. Where your colleagues with the skinny ties and punky shoes use advertising agencies to push edgy tag lines and expensive media buys, you can find opportunity - and precedent.

Advertising is the rattling of a stick inside a swill pail.
George Orwell

Increasingly, public relations agencies are touting in-house social media practices. They're rolling out their own branded blogs and podcasts, just to prove they can do it.

As a result, you can now hire an agency to help you develop a strategy that just happens to include a social media campaign.

There's nothing senior executives like better than the comfort that an overpaid and over confident consultant brings to a conversation

about the political or organizational risk posed by a new communications tactic.

After all, if the tactic goes south, it must be the agency's fault - either in the conception, the elaboration or the implementation.

Keep your enemies closer

The folks in IT department are not your enemy. They are just locked into a relationship with their major software suppliers.

Their network was designed to support that software, and your IT specialists are in constant training to keep up with changes in that software.

Social media applications often challenge the stability of those relationships - especially if your network is a rickety web first built in the early 90s.

Think of bandwidth hogs like YouTube as Homer Simpson, and your network as an all-you-can-eat seafood buffet.

The IT department is just trying to keep the information buffet supplied, with a minimum of service failures and complaints.

They really don't have the time to tweak the recipes.

What's your password, Michael?
[IT guys look at sticky note attached to monitor] Oh, it's 1 2 3 4.
Office Space

Isolate and Neutralize

As a self-appointed social media advocate in your organization, you have to build support within your IT department.

In practice, this means finding the techies, managers and information architects who actually demonstrate an interest in social media.

The simple truth is, you never stand so tall
as when you stoop to kiss ass.
Carville and Begala

How do you do that?

Drop hooks into your conversations: "You know, I prefer the flexibility Firefox plugins give me," or "I was listening to a podcast about ...," or "There was an interesting thread on Slashdot last week..."

That will accomplish two things: it will flag that you may be experimenting with the network on your desktop, and it will send out a mating signal that you are interested in speaking to other technically adept types.

The result? You'll either come in to work one day to discover that your desktop computer has been wiped clean, or friendly IT staff may eventually drop by to suggest other "improvements" you might want to add.

Don't understate the costs

Social media is not Excalibur. It's not a Samurai sword or a Tennessee hunting rifle. It may be, just maybe, a fine set of Ginsu knives.

Lord knows, I sometimes think social media is being pimped out with the fervor and unblinking zealotry of a Billy Mays or a Ron Popeil.

Remember that you work in a large organization. As with any new initiative, you *have* to demonstrate that a social media tactic will

further your business priorities – and will not pose an unnecessary risk to the organization.

What's an unnecessary risk? How about:

- Surprising your boss
- Embarrassing your organization
- Launching a consultative process (i.e., a blog) without anticipating the response and the possible opposition
- Overextending your organization's commitment to a specific project or policy course
- Creating work load that overwhelms your team and your office

Even more importantly, you have to be careful of over promising to your community.

If you know that social media is just an experiment for your organization, be careful about your commitment to participate in a conversation - especially how often, how frequently, and how in depth you will respond to public comment, let alone criticism of your online activities.

Recruiting new troops

If you've worked through the previous advice, you should now be able to build a convincing argument for experimenting with social media tactics in your own office.

After all, you have demonstrated that:

- You have personal experience in social media
- Other large organizations have experimented with social media
- There is citizen demand for interacting with your type
- Many of your existing activities that could benefit from a redesign as a social media tactic
- The risk and reward of trying new technologies can be managed

Really, there's only one piece of advice left:

Kneecap the red tape brigade

I'm often asked if the introduction of social media tactics requires new human resources policies - you know, to deal with the slander, the leaks, the allegations, even the sexual harassment.

No.

Any organization worth their salt has already put policies in place to deal with:

- Interpersonal conflict
- Confidentiality of information
- Who acts as a spokesperson
- Sexual and physical harassment
- Protection of personal information

Social media does not cause a new range of human behaviour - it simply magnifies the faults in that behaviour.

In an online environment, your community, clients, and customers do expect a far quicker response when things go wrong.

Any of your organization's existing H.R. and administrative policies should be flexible enough to deal with these faults.

Victory

All that's left is the shopping list of cool electronics – voice recorder, microphones, extra large monitors, video editing software, and the installation of a raft of online applications.

And you could even convince someone to buy you an iPod Touch.

After all, you've built a legitimate business case for the purchase.

Thanks to your subversive and subliminal plan, your managers and senior executives have been lulled into a sense of comfort and confidence about the possibilities promised by new communications vehicles – whether a blog, a podcast, a video cast, or any other social media application.

All that comes now is the implementation ... and the measurement.

Good luck with that!

I was having fun on this job! You had all this energy, and all these crazy ideas... and you kept taking your pants off.
Secret of my Succe\$s

Resources

While there are hundreds or thousands of sites ready to provide information on social media and the use of new technology, only a relatively small number focus on getting tools into the hands of freaks hooked on the social media juice – but stuck in a large organization. Here are just a few:

Community Guy by Jake McKee – <http://communityguy.com>

Designing for Civil Society by David Wilcox-
<http://www.designingforcivilsociety.org/>

DavePress by Dave Briggs- <http://davepress.net/>

How Nonprofits Can Use Social Media by Beth Kanter-
<http://beth.typepad.com/>

etoolkit wiki - <http://etoolkit.wikispaces.com/>

The D-Ring by Steve Field - <http://dring.wordpress.com/>

Whitehall Webby by Jeremy Gould -
<http://whitehallwebby.wordpress.com/>

So this is mass communication by Kaye Sweetser -
<http://kayesweetser.com/>

Social Customer Manifesto by Christopher Carfi -
<http://www.socialcustomer.com/>

PR 2.0 by Brian Solis - <http://www.briansolis.com/>

Diva Marketing by Toby Bloomberg -
<http://bloombergmarketing.blogs.com/>

New Zealand Public Sector Blog by Jason Ryan -
<http://www.psnetwork.org.nz/blog/index.php>

Web Strategy by Jeremiah Owyang - <http://www.web-strategist.com/blog/>

Connected Republic by the folks at Cisco - <http://www.theconnectedrepublic.org/>

Ideal Government by William Heath - <http://www.idealgovernment.com/>

My Conversations by Connie Bensen - <http://www.conniebensen.com/>

Charles Leadbeater - <http://www.charlesleadbeater.net/>

Wikinomics Blog - <http://www.wikinomics.com/blog/>

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