



Leading IT Service & Support

THINK
SERVICES
A Division of Sunbelt Information Systems

HDI Local Chapter Social Media Best Practices

by

HDI Local Chapter Social Media Working Group



Table of Contents:

Introduction to Social Media and HDI Local Chapters	3
Why Use Social Media in Your Local Chapter	4
How to Get Started	6
LinkedIn	8
Facebook	11
Twitter	13
Plaxo	14
Document, Video, and Photo Sharing	16
Blogs	18
Newsletters	20
Ideas to Get You Started	22
Appendix: Chart of Document Sharing Solutions	23

Acknowledgements

Many thanks to the following people for their time and assistance in participating on the HDI Local Chapter Social Media Committee, and in the preparation of this document:

- Brandon Caudle**, VP of Communications – Sacramento HDI
- Phil Gerbyshak**, President – Brew City HDI, Midwest Regional Director, MAB
- Roy Atkinson**, President – HDI Northern New England
- Jamie Kuttenkuler**, Co-VP Communications – HDI Gateway St. Louis
- Marie Clark**, HDI Susquehanna Valley, NE Regional Director MAB
- Eric Euting**, VP Membership – Brew City HDI
- Rich Hand** – HDI
- Rick Baucom** – HDI
- Sophie Klossner** – HDI
- Dan Wilson**, MAB Chair – HDI Motown President

Introduction to Social Media and HDI Local Chapters

What is Social Media? How do we use it within our local HDI chapters? How will it help us?

Social Media is the communication tool of today. No longer just a Gen Y phenomenon, Social Media has pushed its way into mainstream America and virtually boomed overnight, with a rate of adoption faster than any previous technology, including television and the Internet in general.

As of Summer 2009, there are literally dozens of well established Social Media applications and Web sites in use, with a solid few capturing the market. Facebook, LinkedIn and similar sites allow us to communicate with friends and colleagues. Blogs and microblogging applications such as Twitter have moved from the realm of personal trivia to a place where meaningful conversations occur. Sites like YouTube, Flickr and Snapfish allow everyone from family members to professional filmmakers and advertisers to easily share videos and pictures. Businesses, Professional Associations and Political Groups have all embraced Social Media as another tool to use in reaching their target audience.

Officers and Members of the 60-plus local chapters of HDI have a broad range of knowledge about Social Media. Many already have LinkedIn or Facebook accounts and a large number use Twitter YouTube and other types of Social Media. Mirroring emerging business trends, there are a growing number of HDI chapters that use Social Media to promote and grow their chapters. In an effort to provide a framework and share knowledge of these growing technologies, HDI Local Chapter Officers launched a Social Media committee to brainstorm, discuss and suggest guidelines and best practices for local chapters to use Social Media.

This document is the result of the committee's and its subcommittee's work. The focus is the use of Social Media by the local chapters to communicate and share information. It reviews the most popular Social Media sites: LinkedIn, Facebook, Twitter and Plaxo. Since the world of Social Media is ever-expanding, this document also addresses several other communication methods chapters may use, among them, video and photo sharing, document sharing, blogs and newsletters.

This white paper begins with the overall question of "Why use Social Media". It gives a basic outline of how to get started using Social Media to promote and grow your local chapter, including guidelines on ensuring representation as local HDI chapters with a unique individual identity but still linked to HDI Global . Different types of Social Media and communication methods are examined in detail. Some pros and cons of each Social Media are given, along with best and worst practices. Ideas on how a chapter might use the various forms of Social Media to interact with their members and potential members are also presented as a launching point for chapter officers to brainstorm how they will use Social Media in their local area.

This document is being published to the local chapters to serve as a "living" repository. Due to the nature of our industry and the continuous evolution of technical tools, it will never truly be "finished." Rather, it serves as a launching point for further communication in and between chapters. A LinkedIn subgroup, HDI Social Networking Group, has been created under the HDI Global LinkedIn group. It is hoped that this forum will continue the conversation and explore new ways to use Social Media to enrich the chapters, officers and members of HDI.

Why Use Social Media in Your Local Chapter

Engage members and bridge time between meetings.

- Create a list of updates you'd like to send to your members in between meetings.
- Using Social Media to interact with members and potential members between meetings shows that the chapter is active and will hopefully promote additional activities of members and those considering membership to be part of your chapter.
- Grow your ITSM or Service Support network proactively by connecting within one Social Media site to one of the following groups:
 - Your company.
 - Your local chapter.
 - Your geographic community.
 - Your alumni.
 - Your specialty.
- Post pictures of the last event on Flickr, being sure to tag each person by name and with the chapter name.
- Use content from others to begin conversations. Retweet or repost blog entries from people such as Kirk Weisler, Phil Gerbyshak, Brandon Caudle, etc. Link to existing articles and white papers from Cnet, HDI, etc.
- Participate in conversations as officers and/or as a chapter.

Grow your membership.

- Start following other similar organizations. Some users might be interested in who you are if they see your name there.
- People “stumble” on Groups online because of their contacts on Social Media sites. If your membership all joins the local chapter's group, their “friends” will learn of the group and may join it based on the membership of their friends. It is absolutely necessary that the page be enticing enough to bring in complete strangers who are not familiar with the group's function.
- Talk to one person via any method, including Social Media, who is a member at a company with others who should join and find out why they are not members.
- Search for folks who are interested in Help Desk & Service Desk on Twitter and invite them to the next meeting.

Increase meeting attendance.

- Spice up your site and add a fun teaser about your next event.
- Using the upcoming topic or speaker, utilize the site for links to information on the presenter, his or her company, or the topic at large.
- Create a template for how to create events so anyone can do this.
- Join groups on LinkedIn and post meeting news or tidbits from speakers or to join the local HDI Chapter.
- Use Social Media to advertize raffles and/or giveaways at your meeting.

Drive people to your chapter or Global HDI website.

- Make sure your social networking tools are all linking to your chapter and the HDI website.
- Blend types of Social Media: refer to your blog on Twitter, embed a YouTube video on your Facebook page, etc.
- After building interest in the Social Media group, strategically put links within the group taking people to the chapter website.
- Add your site's RSS feed to all of the various other systems that will take it.
- Use the link for the HDI Chapter website in your email and Social Media signatures — LinkedIn.

Find speakers.

- Create a link or section of your site for potential speakers. Advertise the benefits of speaking at an HDI meeting there.
- Make it clear on your page that you are always looking for speakers for your chapter. When someone “stumbles” on your page, if they have a background in speaking but may not necessarily be looking to become a member, provide a link to the VP of Programming's email so he or she can coordinate directly and become a future speaker.
- Post need by topic in a focused LinkedIn group.
- Search out and contact folks who have spoken on the topic you wish and send them an email.

Find sponsors.

- Create a link or section of your site for potential sponsors. Advertise the benefits of becoming a sponsor there.
- Indicate that your chapter is a Non-Profit organization and that you are always looking for sponsors of venues, lunches, giveaways, speakers, etc. Although money may be tight for a company to give money, they might be willing to donate something such as sandwiches, a meeting place, etc. Sponsorship doesn't necessarily have to be monetary but could be time, place and materials.
- Use LinkedIn and search companies from HDI sponsors for people who are in your geographic area, then connect with them in LinkedIn, or go to www.anywho.com or Google to find a phone number and call them.
- See who has a Social Media presence and invite them to speak to your chapter about their activities. Let them know that if they sponsor, folks will connect with them on the platform they discuss.

How to Get Started

Develop a local chapter brand (name, logo, tag line, mission statement, etc.) if you have not already done so.

- CHKR (Chapter Knowledge Repository, on www.thinkhdi.com, accessible to Officers) has examples and suggestions.
- Your Regional Director and Local Chapter Membership Director Sophie Klossner can help.
- Browse other local chapter Web sites.
- Bounce ideas off of other chapters in the region and even nationally. How you see your local area might not be how others identify it.
- Seek out other resources as needed to design your logo.

Set up and maintain Social Media accounts, based on your local chapter strategy.

- Utilize Facebook, LinkedIn, Twitter, etc.
- Determine the type of page (e.g., group vs. fan/personal page) depending on your chapter's goals.
- Use a consistent naming convention whenever possible between types of Social Media to reinforce your brand.
- Make sure to use the "Guidelines for Local Chapters" below when setting up your sites.
- Link to HDI Global (www.thinkhdi.com) pages.
- Link to your other Web sites and Social Media sites for your chapter.
- As with all Social Media, remember that people access it in different ways and from different locations. For example, many sites are blocked at work, and mobile-enabled devices are changing how people access Social Media.

Start using Social Media

- Make sure you update and maintain the accounts regularly. To do this you might:
 - Create a new board position for Marketing.
 - Expand or update the VP of Communication role.
 - Utilize a committee; it's a great way to get young analysts involved.
 - Create a response threshold to ensure a timely response to questions or comments.
 - Keep comments updated and fresh. Reuse content from related sources, making sure to give credit as appropriate.
 - Write and post all content and comments as a chapter on the chapter accounts.
 - Add value to the conversations by providing relevant information, helpful tidbits and connecting people and resources
 - Remember that all content is public and permanent.

Develop a Social Media strategy.

- Who is your target audience? What is your main goal (increase attendance, increase awareness of your local chapter, etc)?
- Choose which types of Social Media you are going to focus on (LinkedIn, Twitter, Video Sharing, etc) and/or how you will combine types
- Consider segmenting your "connections," "friends," "followers," etc., and then do mass customization in your strategy. For example:
 - Members vs. non-members.
 - Managers vs. analysts.
 - Vertical markets.
 - Large vs. small help desks.

- Use a mix of traditional and virtual marketing (not all IT professionals are on the leading edge of technology).
- Market to all of the generations in your workplace (Boomers, X'ers, Y'ers, etc.).
- Discuss and brainstorm ideas with other local chapters and regions.
- Read blogs and marketing articles to find new ideas.
- Order any needed physical marketing items based on your strategy. Possible sources:
 - Local promotional item company.
 - CafePress.com or other Internet retailer.
 - HDI eStore on www.thinkhdi.com
- Review what is effective for your chapter by surveying your members.
 - What Social Media do they use?
 - Where do they access it: home, work, mobile device, etc?
 - What are their main purposes in using Social Media?
 - Where/How did meeting attendees hear about the meeting?
 - What content do they want to know more about? Topics that are not good future meeting topics, or ones that you have recently covered, are great topics to then build a Social Media conversation around
- Include Social Media in your succession planning, multiple officers with access and the knowledge of the password, etc.

Guidelines for Local Chapters

On each Social Media application or site, local chapters should identify themselves as a specific local chapter (e.g., Seattle HDI Facebook Group, Mississippi LinkedIn Group) so as to differentiate themselves from the Global HDI sites. Local chapters are encouraged to use the “brand” that they use on their current Web sites to clearly identify themselves to their intended audience.

Chapters may use the HDI logo on their sites, pages, groups, etc., as long as the existing guidelines are followed (must identify the chapter so as to differentiate it from the Global organization, must not be skewed in size, etc.; full guidelines are posted on CHKR, which is the Chapter Knowledge Repository on www.thinkhdi.com, under Members, and which is accessible only to Local Chapter Officers).

Chapters are encouraged to link to the Global organization in a way that clearly illustrates the connection and the difference in the two organizations.

LinkedIn

Why Use LinkedIn?

- Most respected professional social network.
- Easy to create groups, send messages to focused audience.

LinkedIn Best Practices

LinkedIn beginners:

- Create a LinkedIn profile for your chapter.
- Remember that your profile is an elevator pitch for your chapter.
- Start a reading list. Ask your officers what business or technical books they are reading to create your list.
- Answer and ask questions as a chapter identity.

LinkedIn advanced users:

- Google your group's name to see where your LinkedIn profile is ranked, and complete your top 10 content or profiles (e.g., Plaxo, UNYK, Xing) with your LinkedIn personal profile link.
- Manage your contact information. Always include the LinkedIn URL or hyperlink in your email signature and in Anywho (AT&T directory).
- View your Profile from the outside. Look and feel as a visitor; give it a critical read.
- Input your Public Profile Contact Information beyond the 100% profile content. Go down the right side of your public profile and find the label "Your private info about Name," then be sure that all of the information is up to date (it does not appear that this public contact information may be filled from the LinkedIn Profile information).
- Create a presentation and send it to 50 members of your HDI group (or members of your chapter who are not in your LinkedIn group).. Consider a business case.
- Use Ning.com and link up LinkedIn to your other Social Media sites.
- Add all active and past emails to Accounts & Setting, Email Addresses.
- Create a signature to cut and paste into every response to invitations. The signature should have bullets of your elevator pitch and any links to a Web site or presentation that makes it easy for them to learn more about HDI and your chapter.
- Post a request with very specific criteria to connect within a Group as a Discussion.

Examples of tremendous results:

 - Two speakers for itSMF from California and Illinois, and both paid their way to voluntarily speak (Pat Fihn and Randy Steinberg, authors of 4 books and Subject Matter Experts SME).
 - Job lead from a post to connect on College Group (Tom Deutsch).
 - Other tips and techniques (bold indicates a "must do"):
- Create a user-friendly profile. Your LinkedIn profile is your virtual business card. Make sure it represents you the way you want HDI and your chapter to be viewed by strangers.
- Invite members and officers to join the group.
- Incent your members to join the group (offer a \$10 raffle each month to all members of the group).
- Pass along requests promptly, or say why you won't. Membership in LinkedIn is a kind of agreement with the community that you intend to participate as an active node in a large and vibrant network. If people send you requests that sit there unforwarded and unresponded-to for weeks, you're not only a weak link in the system, you're impeding someone else's business efforts, and giving no reason for your bottleneck behavior.

- Avoid the boilerplate text. Unless you're terribly afraid to strike out on your own with creative verbiage, make an effort to put your own stamp on the standard invitation language that LinkedIn supplies.
- Play by the rules. Avoid misusing LinkedIn in a way that conveys the message "I don't care about the long-term health of this network or the company that built it—this is All About Me."
- Value relationships over transactions. As in physical-world networking, valuing people for their intrinsic worth over the business transactions they enable is key.
- Alphabet batch: one alphabetical letter a week from your Contact Manager—a personal message or core message with a personal touch, 20 minutes per week.
- Get 100 connections ASAP (it is really three degrees of separation, not six). If you have 100 1st Level connections, you should find 25,000 2nd Level connections and more than 2,000,000 3rd Level connections.
- Remove unneeded or unwanted connections. The person removed is not notified but is added back to your imported connections, so he or she could be invited again.
- Cut and paste from Word to use spell check for all content used in LinkedIn. Nothing ruins great content like bad grammar.
- Use PingFM to aggregate your LinkedIn content with your other Social Media work.
- Use all the multimedia available on LinkedIn (support video, presentation, reading lists, trip reports and much more). Remember, your target audience must hear the message seven times in order to believe it and act on it.
- Follow LinkedIn advice. It's the best, and they are not trying to cost you but really to help you.
- Search and Invite. Search LinkedIn for all the existing people you know and work with; they might already be members.
- Employ frequently asked questions. Answering them will demonstrate that you are dynamic and capable in your industry; answer the questions asked by your target market first to help you break the ice and get new customers. Asking them will initiate business relationships that ultimately pay off.

LinkedIn Worst Practices

- Spending too much time learning LinkedIn rather than diving in and doing it for yourself. It is sink or swim.
- Not completing your profile to 100%. Only 35% of those interested in learning LinkedIn have a complete profile, according to survey data from Dean Delisle.
- Falsifying any information in your profile.
- Spamming any LinkedIn groups.
- Concentrating on quantity over quality.

LinkedIn References

LinkedIn Answers for Nonprofits <http://learn.linkedin.com/non-profits/>
LinkedIn Answers for Nonprofits (a PDF) http://www.linkedin.com/answers/browse/non-profit/non-profit-fundraising/NNP_FUN
LinkedIn for Nonprofits (PDF) <http://epic.cuir.uwm.edu/entech/web/symposium2009/handouts/LinkedIn%20for%20NonProfits.pdf>
Nonprofit LinkedIn Best Practices <http://www.nonprofitmarketingzone.com/college/linkedin/>
Nonprofit Web Site Best Practices <http://www.digitalmediabuzz.com/2009/05/non-profit-website-design-examples-and-best-practices/>
Dave Taylor's Best Practices for LinkedIn <http://www.nten.org/blog/2007/10/23/nonprofits-can-be-linkedin>
Dave Taylor's Best Practices for LinkedIn Job Search ... http://www.askdaveytaylor.com/what_are_best_practices_for_a_linkedin_job_search.html
LinkedIn Etiquette http://www.intuitive.com/blog/etiquette_for_linkedin_and_the_professional_networking_world.html
6 LinkedIn Best Practices <http://weblog.simondshaies.net/post/2008/03/22/Six-LinkedIn-Best-Practices.aspx>

Facebook

Why Use Facebook?

- Most popular site on the Social Media planet.
- Most are familiar with it.
- Links to inline communities and bidirectional conversation.

Facebook Best Practices

- Give your fans a reason to become fans.
- Use updates to ask questions and elicit responses, not to deliver press releases.
- Engage fans through creative content.
- Hypertarget with Social Ads and with Updates.
- Give fans reasons to post content on your profile page.
- Worry less about developing a custom good application, and worry more about creating good conversation.
- Monitor conversation.
- Thank and respond to the positive.
- Respond even more diligently to the negative.
- Configure your page's "Settings" to allow more participation.
- Use your chapter's logo as your page picture.
- Put "http://" before all Web sites in "Updates."
- Add and use the "Links" App to get your chapter to show up in "News Feeds."
- Ask questions to spark conversation and activity on your page.
- Add the "Causes" App for fundraising, but don't just limit your chapter to using Causes for Facebook fundraising.
- Add the "Notes" App and feature it as a Tab if your chapter does not have a blog.
- Add the "Social RSS" App and featured it as a Tab if your chapter does have a blog.
- Select a vanity URL that matches your chapter's Web site.
- If you have an existing Facebook page for your chapter, ask your pre-April 2009 friends to opt-in to receive your Status Updates.

Facebook Worst Practices

- Posting controversial information on your personal profile that is associated with a business or an organization on Facebook.
- Attacking or demeaning your competition via a business or group page, or even on a personal page associated with the two.
- Using Facebook to go after potential customers and/or members relentlessly or illegally.
- Neglecting your Facebook page updates. If you want people to join and interact, it must be kept up to date.
- Neglecting your Facebook page members. Interact regularly and keep the conversations going; moderate them.
- Using Facebook to spam your members. Regular update messages and emails doesn't mean twice a day.

Facebook References

Facebook Mistakes (from New York Times)

..... http://www.nytimes.com/2006/06/11/us/11recruit.html?_r=2&ex=1165467600&en=6eac971b1eeb8246&ei=5070&oref=slogin

Facebook Stunt (Examiner.com)

..... <http://www.examiner.com/x-1527-NY-Government-Examiner~y2008m12d7-Obama-staffers-Clinton-stunt-shows-the-importance-of-having-a-Grated-Faceboom-page>

Hacking Facebook <http://www.insidefacebook.com/2008/07/15/facebook-settles-hacking-suit-against-canadian-adult-site-for-500k/>

WOMMA Facebook Best Practices <http://www.slideshare.net/WOMMAssociation/best-practices-on-facebook>

Diosa Communications Facebook Best Practices <http://www.diosacommunications.com/facebookbestpractices.htm>

Twitter

Why Use Twitter?

- It's the "next big thing" as of this writing.
- Short, simple messages with links can drive traffic to your site or blog or both.
- It's free to use, easy to maintain.

Twitter Best Practices

- See how other businesses, associations and groups are using Twitter.
- Follow similar organizations (other HDI chapters, other IT associations, other support groups, etc) on Twitter to establish a brand presence within a conversation.
- Be dedicated to Twitter; have more than one person writing updates on Twitter.
- Follow the Twitter Code of Ethics:
 - Let your followers know what HDI and your chapter are about.
 - Respect other Twitterers. Know when to participate and when to listen.
 - Think before you direct message (will it be helpful or intrusive?).
 - Make sure your message directly relates to those you are reaching out to.
 - Provide value to your followers.
- Spread the word about HDI and your chapter's participation on Twitter.
- Have a bio about HDI and your chapter.
- Say "hi" to new followers.
- Remember that everything you Tweet could live forever.

Twitter Worst Practices

- Using Twitter to sell.
- Just Tweeting and not following others to join in or start a conversation.
- Being boring.
- Tweeting anything about your members or sponsors that you would not want them to see.
- Not personalizing your account.
- Being a self-appointed authority.
- Expecting Twitter to always be there for you. They do experience technical delays and downtimes.

Twitter References

The Creation of Twitter Best Practices: Round 1 <http://blog.ogilvypr.com/2008/08/the-creation-of-twitter-best-practices-round-1/>

Twitter Best Practices So Far <http://www.davidleeking.com/2008/06/25/twitter-best-practices-so-far/>

Becoming a Valuable Member of Twitter: Pitfalls to Avoid
..... <http://greenvilletweets.com/2009/03/becoming-a-valuable-member-of-twitter-pitfalls-to-avoid/>

KCNN: Twitter Do's and Don'ts http://www.kcnn.org/modules/twitter_dos_and_donts/

Best Practices for Branded Twitter Accounts (awesome stats) <http://www.ignitesocialmedia.com/best-practices-brands-twitter/>

Ultimate Guide to Twitter – Marketing, Tips, Best Practices & More (link fest)
..... <http://www.webanalyticsworld.net/2009/02/ultimate-guide-to-twitter-marketing.html>

TwiTip (“Twitter Tips in 140 Characters or More”) <http://twitip.com>

Phil Gerbyshak's 30 Minute Twitter Solution <http://www.philgerbyshak.com/30-minute-twitter-solution/>

Plaxo

Why Use Plaxo?

- More of a mix of friends and business than LinkedIn.
- Your “Pulse” can be sent out to your connections indicating changes.

Plaxo Best Practices

- Send out birthday cards to members to demonstrate that you have a good feeling and to provide that “warm, fuzzy feeling” (time invested: about 30 minutes each week).
- Back up your contacts in case your email or computer blows up.
- Connect to Twitter, Facebook, a blog, or Flickr for a nice stream of information.
- Target your network. Network is work, not just family, neighbors and friends, and not aimless one-on-one meetings and endless contacts with nothing to show for it but a gas bill, lost time and too much caffeine. Target companies and people. Carry a list and show it to people.
- Use www.anywho.com to find a person’s home number and address. Use Reverse Phone to find the phone number when you have an address.
- Use the company Web site to get the email address convention then try to email the person.
- Use an offline contact manager to link Plaxo to Outlook, Act, Goldmine, Salesforce or, at worst, an Excel spreadsheet.
- Make a Really Good People group within your network. This should be people you can trust, who will give honest candid or even unsolicited feedback, who will pull you up in your personal and professional life and who are always willing to help or refer you.
- Keep the network fresh. Recognize that if you have not spoken to, emailed, or seen someone in a year, they are no longer in your network.
- Make it personal. Keep track of children and spouse names, birthdays, anniversaries. Cut and paste their LinkedIn profile into your contact manager for their career summary.
- Add names to Plaxo regularly and make a custom invitation, and Plaxo will send reminders to join. Plaxo works while you sleep; once connected, you will have their latest contact information at all times.
- Get a business card scanner. This is fastest way to get business card data and into your Personal CRM so you can then point Plaxo to the new list of contacts.

Plaxo Worst Practices

- Cluttering the stream of information with too much connected in.
- Deleting stuff from your desktop can delete it from Plaxo.
- Not completing your Plaxo profile.
- Not linking LinkedIn to Plaxo and your other Social Media methods.
- Spamming your Plaxo network for a job, a pyramid or multi-level marketing product.
- Abusing your network for referrals.
- Putting your Plaxo list on your blog or newsletter with no opt out.
- Forgetting that you get to Plaxo and your contact from any Internet browser.
- Putting personal information in Plaxo without thinking of the ramifications. For example, birthday year tells people how old you are, sex tells people something you many not want them to know, home address with a LinkedIn Tripit tells people where you live and when you are not at home, and location can eliminate your from a job search (consider putting the local airport zip code instead).

- Including too much information. Be concise, keep it simple, be relevant, be an answer, be gone.
- Pursuing quantity over quality. Be someone people can reach, can meet and can be helped by. Being a name dropper will backfire at some point.

Plaxo References

Portable Contacts lets you get friends' info on other sites

..... <http://venturebeat.com/2009/03/26/portable-contacts-lets-you-get-friends-info-on-other-sites/>

Combining a few bullets on p. 14 or shortening the length of a few to save some lines brings this info up to the previous page.

Document, Video, and Photo Sharing

Why Use Document, Video, and Photo Sharing Social Media?

- Members who aren't able to attend a meeting may view it online (recaps of meetings, Video, Documents).
- Taking advantage Virtual Technology provides cost savings.
- It helps to engage members.
- As a marketing vehicle, it promotes both the local chapter and HDI as a whole.
- It can include policies, procedures, advertizing information.
- It can use quotes or testimonials from members and attendees.
- It communicates the value of membership.
- It facilitates an ease of accessing information and collaboration.
- It increases networking opportunities.
- Photos help highlight AOY, spotlight members and demonstrate meeting participation.
- Pictures can tell a story without words.

Document, Video, and Photo Sharing Best Practices

- Be consistent with usage from meeting to meeting. For example, use a similar format, post a three-minute video, etc.
- Present information from meetings so that those who cannot attend can still get the information.
- Promote your local chapter using it.
- Maintain a professional atmosphere and environment.
- Ensure that you have rights or permission to post any copyrighted material.
- Incorporate music if possible.
- Obtain feedback on members' needs by using a statistical count of Web hits and surveys.

Document, Video, and Photo Sharing Worst Practices

- Illegibility.
- Broken links.
- Alienating members.
- Offensive material.
- Surveys with no follow up.

Possible Tools to Use for Document, Video, and Photo Sharing

Document Sharing

- **Office Live**
 - Pros: Easy to use; versioning; can create workspaces; can share folders.
 - Cons: Must have Windows version of MS Office.
- **Huddle.net**
 - Pros: Flexible and combines many tools.
 - Cons: Really designed as a project management collaboration tool.
- **Google Docs**
 - Pros: Do not need to have MS Office.
 - Cons: Cannot share folders.

■ **Slideshare**

- Pros: Easy to use; allows pause.
- Cons: Cannot edit online; frequent email from Slideshare.

All four products are free and can be upgraded. The Appendix includes a table of the first three options listed here with details of their compatibility and capacity.

Photo Sharing

■ **Flickr**

- Pros: Easy to use.
- Cons: Free account has limited capacity.

■ **Shutterfly**

- Pros: Easy to use; archive DVD's are available.
- Cons: Archive DVD's are only refunded in case of defect.

■ **Kodakgallery.com**

- Pros: High storage capacity.
- Cons: Orders (prints, etc.) cannot be changed or canceled; not really considered by the Social Media world.

■ **Snapfish**

- Pros: Recognized name.
- Cons: Misleading; makes it look like you have to have an account when you don't.

Video Sharing

■ **YouTube**

- Pros: Most people know of it; ease of use.
- Cons: 10 minute video limit

■ **Vimeo**

- Pros: Various account levels, if you wish.
- Cons: Many people haven't heard of it; noncommercial use only.

Document, Video, and Photo Sharing References

Google Docs Tour	http://www.google.com/google-d-s/tour1.html
Why Aren't You Using Google Docs Yet?	http://www.mikekujawski.ca/2009/07/28/why-arent-you-using-google-docs-yet/
Using Office Live	http://ask.officelive.com/workspace/wiki/support/share-workspaces-and-documents-using-office-live-workspace.aspx
Using Huddle Workspaces on LinkedIn	http://www.huddle.net/about/linkedin-cases
Guide to Using Flickr	http://www.doshdosh.com/comprehensive-guide-to-using-flickr-for-traffic-building/
Using Shutterfly for Online Photo Management	http://www.syl.com/articles/usingshutterflyforonlinephotomanagement
Kodakgallery vs. Flickr	http://www.simpleptalk.com/data/storage/kodak-gallery-vs-flickr-battle-for-best-photo-storage-site/
Using Snapfish	http://www.photosharingnuggets.com/2008/03/using-snapfish-to-store-your-photos.html
Using YouTube to Drive Traffic	http://www.pronetadvertising.com/articles/using-youtube-to-drive-traffic-to-your-site.html
Baby Steps to Using Vimeo	http://www.absolutebica.com/2009/02/baby-steps-into-using-vimeo-with-my-first-video/

Blogs

Why Have a Chapter Blog?

- Major objectives:
 - To reinforce the chapter's Web presence.
 - To publicize events, speakers, meetings.
 - To deliver content that contributes to professional development.
 - To entertain and enlighten all, not just members.
 - To broaden the reach of HDI's mission and message.
- Having a chapter blog should be a considered decision. A blog will require time, commitment and planning. Don't launch a blog on a whim.
- If your existing chapter Web host doesn't offer a blog option, there are many places to host your blog for free, such as Blogspot.com and WordPress.com. Hosting sites grow or wane in popularity or availability over time, so do an online search for "free blog hosting" when you are ready.

Blog Best Practices:

- Always use the HDI logo, name and collateral appropriately and in accordance with guidelines.
- Identify ownership and authorship as a chapter, not as just "HDI."
- Use a visual theme similar to the chapter Web site.
- Create an editorial policy: What goes on the blog, who is responsible for it, who should review it.
- See how other chapters are naming and using blogs to avoid duplication and confusion.
- Create several posts before launching the blog.
- Make the blog open and available to everyone who is interested.
- Make the blog visually attractive and interesting.
- Follow bloggers with similar interests to create conversation.
- Crosslink to and from your chapter's Web site.
- Link to other chapters' blogs and sites.
- Give administrative and editorial access to more than one person. This should be a committee effort.
- Update the blog consistently and frequently.
- Plan for either continuing upkeep of the blog or removal of the blog; don't let it just die.
- Follow the Blogger Code of Ethics:
 - Let your followers know what you are about.
 - Respect other bloggers.
 - Make sure your message directly relates to those you are reaching out to.
 - Provide value to your readers.
 - Encourage comments and respond kindly to them.
- Have a bio on the blog that's about your chapter.
- Say "hi" to new followers.
- Spread the word about your blog; for example, use:
 - Twitter, if your chapter has an account (crosslink; mention other ways to contact and follow).
 - A chapter Web site announcement about posts, with links.
 - Email with an announcement and link.
- Remember that everything you blog could live forever, and reflects on present and future members as well as HDI Global.

Blog Worst Practices:

- Plagiarism.
- Posting copyrighted material without permission.
- Neglecting the blog.
- Not repurposing material, but having to rewrite everything: newsletter, Web site, blog, etc.
- Using the blog to push ads or brand messages, or allowing random ads on the blog.
- Posting a speaker's material without proper permission.
- Not soliciting comments.
- Using the blog to post information unrelated to the chapter.
- Poorly written posts.
- Posting internal chapter business.
- Being a self-appointed authority.
- Taking every opportunity to sell.

Blog References

Corporate Blogging: 7 Best Practices <http://www.businessknowhow.com/internet/corporate-blog.html>
Pheedo's Blogging Best Practices http://blogs.forrester.com/groundswell/2004/10/pheedos_bloggin.html
Blogging Best Practices Checklist for Optimization <http://www.capturetheconversation.com/read/blogging-best-practices-checklist>
Blogging Best Practices – 8 Simple Rules <http://gold.weblogsinc.com/2005/11/29/blogging-best-practices-8-simple-rules-for-credible-blogging/>
Best Practices for Blogging <http://brianrowe.org/2009/03/27/best-practices-for-blogging/>
10 Business Blogging Best Practices <http://socialmediab2b.com/2009/06/business-blogging-best-practices>

Newsletters

Why Use a Chapter Newsletter?

When we talk about Social Media, we usually focus on applications like Twitter, Facebook and LinkedIn. However, newsletters are an important aspect of Social Media that can serve a valuable purpose in the HDI local chapters.

While it is tempting to dismiss chapter newsletters in favor of all of the newer Social Media options available today (Blogs, Facebook, etc.), we have to realize that there is still a place for newsletters. They offer another unique way to communicate with your members.

In a world where all information is increasingly at our fingertips, newsletters offer an aggregated view of everything the chapter has to offer in one periodic message. And because many people still read newsletters more than they use Social Media, chapters can use newsletters to direct people to their Facebook page, LinkedIn group, chapter blog and chapter Web site to introduce them to “up to the minute” news.

Goals of newsletters:

- Announce chapter meetings and special events.
 - Newsletters are still a very standard way to let members know that there is a meeting.
 - Emailed newsletters arrive in their inbox on a regular basis and members know that the meeting announcement will be in the newsletter.
- Ensure that we have a regular point of contact with our members.
 - Chapters that have great newsletters establish a primary point of contact with their members.
 - Members will give the local chapter an email address that they trust will not be shared or spammed and one that they will check regularly (usually daily).
- Provide educational content to our members.
 - Good newsletters have more than just meeting announcements.
 - Chapters with good newsletters include relevant content written by local members, both practitioners and vendors.
- Provide links for readers to the chapter Web site and other Social Media sites.
 - A newsletter provides a great vehicle for including links and advertisements for chapter websites, Facebook pages, LinkedIn groups, etc.
- Generate revenue for the chapter.
 - A selling point for our vendors is getting their name and logo in front of our members. Newsletters provide an additional opportunity to do so, with quarterly, monthly or weekly ads.

Newsletter Best Practices

- Set up a template to use over and over. Your readers will appreciate the consistency.
- Be regular. Send out newsletters on a scheduled basis (monthly, quarterly, twice a month, etc.). Readers want a newsletter that arrives on a schedule.
- Ask for feedback. Ask your board to critique newsletters – but be ready for feedback. Then ask your readers for feedback.
- Make it visually appealing. Many tools are available to help the graphically challenged. Online applications like Constant Contact include dozens of templates which are drop-and-drag and WYSIWYG.
- Look at other newsletters and see what you like and don't like about them.

- Make it printable. Newsletters that are print-friendly get passed around and read long after those that are online-only.
- Spell check. Nothing is worse than a newsletter with errors.
- Grammar check.
- Create a position of Newsletter Editor on your board. When you have that position filled, create another one for Assistant Editors to write content monthly.
- Interview a manager each month and create an article for the newsletter.
- Interview an analyst each month and create an article for the newsletter.
- Interview someone who does not work at a Help Desk and create an article for the newsletter. This expands the HDI member base by including people beyond the Help Desk.
- Give credit where credit is due. Link to the source of your content and name sources in the articles.
- Other tips and techniques:
 - Create a catchy name for your newsletter – The Valley View, All Things IT, etc.
 - Use PDF as your format; it ensures that what you want to send out is sent out. You can create it in Word, Publisher, or if you are lucky, an Adobe product.
 - Use a tool such as Constant Contact to send professional looking newsletters with minimal effort. Once you set up a template, it is easy to reuse it.
 - If you are not able to use a web tool to send the newsletter, consider either HTML emails, or use PDF as your format; it ensures that what you want to send out is sent out. You can create it in Word, Publisher, or if you are lucky, an Adobe product.

Newsletter Worst Practices

- Sending out a newsletter without reviewing it and having someone else review it.
- Including content from anyone without proofreading it, not only for spelling and grammar, but also for the content.
- Selling a product in the guise of an article. Working in IT Support, we all know when we are getting a sales pitch; keep the articles separate from the advertisements.
- Stealing. It's wrong and illegal. If you use content written by someone else, get their permission and give them credit. If you find information online, link to the article.

Newsletter References

13 Quick Tips for Creating a Great Newsletter

..... <http://www.articlesbase.com/email-articles/13-quick-tips-for-creating-a-great-newsletter-590781.html>

Newsletter Design – How to Create a Newsletter

..... http://desktoppub.about.com/od/newsletterdesign/Newsletter_Design_How_to_Create_a_Newsletter.htm

Creating Good Newsletters (written for a specific audience but applicable to all)

..... <http://www.kent.edu/ucm/SolutionsServices/MarketingWorkshops/upload/Good-Newsletter-1.pdf>

Constant Contact

..... <http://www.constantcontact.com/>

News Feeds, the Future of Newsletters

..... <http://www.baekdal.com/articles/Branding/newsfeedsnewsletterfuture/>

Ideas to Get You Started

General Ideas

- Blend traditional and virtual marketing to incentivize people to join or follow your chapter; for example:
 - First 50 people to “follow” on Twitter are entered to win a drawing for a _____ or will receive _____.
- Show this Tweet at the next HDI local chapter meeting and be entered to win _____.
- Use quizzes on Facebook. People love them and it’s a great way to generate interest in a speaker or gage audience knowledge of a topic.
- Consider doing a survey via Twitter (remembering that your responses will be slanted, as only those on Twitter will respond).
- Start a conversation via Twitter and ask people about their interests. In addition, ask for questions and feedback from your followers.
- Announce members’ accomplishments, such as promotions, certifications, or awards.
- Differentiate HDI and your chapter with stories of members, meetings, etc. Stories sell.
- Use video or audio clips as a “teaser” for an upcoming speaker. If a speaker doesn’t have a good clip, use a clip relevant to the topic.
- Use content from related sources, such as Kirk Weisler, Phil Gerbyshak, Brandon Caudle, HDI articles and white papers, IT and business websites, etc.
- Show a sense of humor; link to video clips of help desk spoofs, funny commercials, etc
- Cross-mention your chosen Social Media: Talk about the newsletter on the blog; talk about the blog on Twitter; talk about your Twittering in your newsletter; talk about your Web site everywhere.

Cautions

- Don’t use Social Media to push ads or brand messages with no value added (self-promoting/self-aggrandizing).
- Don’t make promises you can’t keep.
- You can guide the conversation, but you can’t control it.
- Be sure to include non-tech members and/or those who don’t participate in Social Media.

Additional References

Examples of Interacting with Followers for Marketing and Branding

..... <http://www.freshbooks.com/blog/2009/06/23/5-tips-for-brand-marketing-on-twitter/>

Marketing with Twitter <http://themarketingguy.wordpress.com/2009/03/30/marketing-with-twitter/>

Social Networking is Meeting Not Marketing <http://themarketingguy.wordpress.com/2008/11/24/social-networking-is-meeting-not-marketing/>

How to Use CafePress as a Fundraising Tool http://www.associatedcontent.com/article/70797/how_to_use_cafepress_as_a_fundraising.html

Appendix: Chart of Document Sharing Solutions

Functional Priority	1	2	3	4	5	6	7	8	9	10
Solutions	Access Control	Space	Online Tools	Ease of Use	Online File Save Options	Number Users	Functional Access Control	Portals	File Ownership	File Compression
Google	Private Workspace File Sharing	10GB	Word Excel Presentation Calendar Tasks	4	HTML Doc PDF RTF Text Word	50 Enable/disable portals per user		Individual Web site Email Docs Chat	Personal	Yes
Office Live	Individual/ shared access	5GB	Word PowerPoint Excel Contacts Tasks	5	HTML Doc PDF RTF Text Word PPT	100	N/A	Individual Web site Email Docs Chat	Personal	No
Huddle	Directory/ File level	1GB	Word Excel Overview RSS Whiteboard Task Discussions Files Meetings Calendar PH Conferencing	3	All, no exe, com	Unlimited	Enable/disable portals per workspace	Collaboration	Workspace	Yes

Special Thanks to the following Local Chapter Officers who gave of their time and talents to serve on subcommittees. Their input has been invaluable in the creation of this white paper.

Social Networking Tools (LinkedIn, Facebook, Twitter):

Jamie Kuttenkuler
 Phil Gerbyshak
 Steven Fuhrman
 Brent Knipfer
 David Chism

Newsletters:

Brandon Caudle

Marketing Your Local Chapter with Social Media:

Marie Clark
 Jessie Malkin
 Bren Boddy-Thomas

Document, Video and Photo Sharing:

Eric Euting
 Eddie Vidal

Blogs and Plaxo:

Roy Atkinson
 Vikki Jansen
 Laura Edwards