

# Social Media Guide



## for Lawyers v. 2.0

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## 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 21<sup>st</sup>-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

# How-To Guide to Social Media Platforms





## TWITTER FOR LAWYERS

Twitter is a real-time information and “micro-blogging” social media tool that enables lawyers and law firms to send potential clients and referral sources brief updates on what’s new with their firm. Posts are limited to 140 characters and are called Tweets. Tweets are sent in real time to any Twitter account holder who has decided to “follow” (subscribe to) the lawyer’s or law firm’s account and can include links to other web pages, such as a firm web site, blog, or article of interest.

The primary benefit of Twitter is to allow users to easily share information on their area of legal expertise, without the time-management and third-party content concerns associated with a Facebook social media profile. On the other hand, Twitter is not ideal for all lawyers because it does not allow users to create a detailed online profile and because it is a different online networking format than they may be familiar with on “traditional” social media sites.

### How to Create a Twitter Account

1. Go to <http://twitter.com/>
2. Select **Sign Up** on right side of the page.
3. Complete the necessary fields (name, username, password, and email).
4. Select **Create My Account**
5. Once welcomed to Twitter, select **Next** to choose accounts to follow. A list of accounts will be displayed on the bottom left of the screen. Scroll down to see what Twitter has identified as possible interesting accounts to follow. Users can follow an account by selecting **follow** opposite the description of the account. When a user is following an account, the follow button will switch to **Following**.
6. Users can also search for accounts they want to follow by using the search field at the top of the page. We suggest searching for the current Meritas accounts, which are “MeritasLawFirms” and “MeritasLI,” by entering the search term “Meritas” in the search field. Select **follow** opposite the description of each account listed after the search. We also recommend that lawyers search for clients, professional firms, professional contacts, media outlets, etc. to follow; chances are good that many of your interests, colleagues, clients, and competitors will have Twitter accounts. Users can also search by subject matter (ie., social media law).

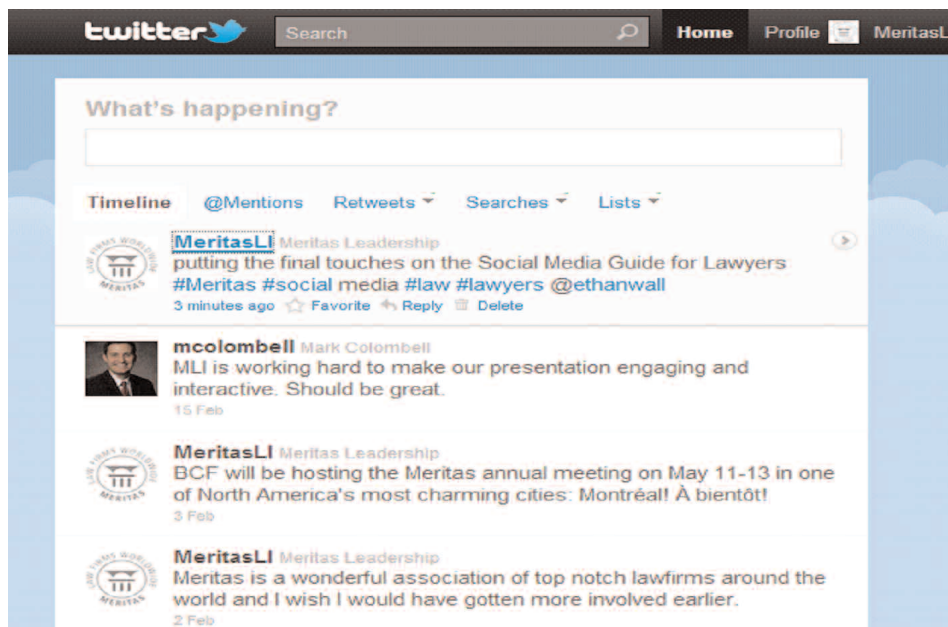
7. Once the user has selected five accounts to follow, Twitter will continue through the setup process. If the user does not want to select five accounts to follow, or cannot find five accounts of interest, the user can select **Skip this step** at the bottom left of the screen.
8. Twitter will continue to prompt the user to enter categories of interest in such areas as sports or music to build up the accounts the user follows. The user can select the suggestions from Twitter or conduct searches on their own.



9. The next page will allow users to use Gmail, Yahoo Mail, Hotmail, AOL, or LinkedIn to search Twitter for existing Contacts who have Twitter accounts.
10. An email will arrive at the registered email address. Confirm the account by selecting the link provided in the email. After this step, users have access to their full Twitter page.
11. After following steps 1 through 10, users can send Tweets by typing a message of 140 characters or less in the field on the upper left corner of the Twitter home page (the field underneath the user name) and then selecting **Tweet**. All Tweets from followed accounts will appear on the left side of the Twitter home page.
12. To further update a Profile, users can include a photo and basic information. Select the user's name in the top left corner of the screen. Add a photo by selecting **+ Photo** in the top left corner or other Profile information by selecting **Edit Your Profile** in the top right corner. Including additional information will help others on Twitter find and follow the user.

## Establish Twitter Privacy Settings

1. Although Twitter privacy settings are limited, they can be established by selecting the user name at the top left of the Twitter page.
2. A new web page will open. Select **Edit Your Profile** on the right side of the page.
3. Users can customize their account settings from this page.
4. By selecting the **Account** heading underneath the user name on the top left of the page, users can change the account settings to block other Twitter account holders from finding their account by the registered email address (emails are not publicly displayed).
5. By selecting the box opposite the **Tweet Privacy** heading at the bottom of the page, lawyers can limit followers to only those who are pre-approved to follow their Tweets.
6. Select **Save Changes** to confirm that all changes are made.
7. Select **Privacy** on the left side of the page (in the greyed out section below **twitter**) to view additional information regarding Twitter's privacy policy.







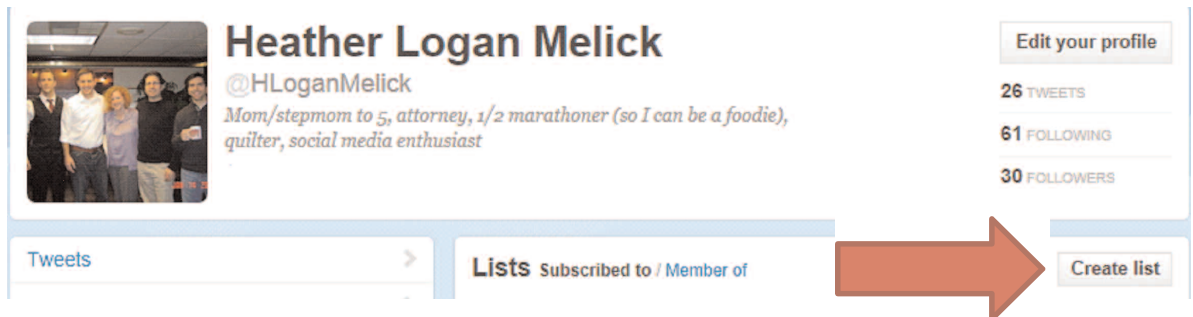
## Twitter Lists

Twitter Lists can be very useful to control the stream of information, or Tweets, the user receives on the Twitter feed. Twitter Lists allow users to organize other Twitter users into Lists that help them more easily monitor different networks of friends, colleagues, and interests. Setting up a List enables the user to view only the stream of Tweets from people included in that List. For example, users could create a List called “Meritas,” which would allow them to quickly review any Tweets by Meritas lawyers or firms without reviewing every Tweet in their Twitter feed.

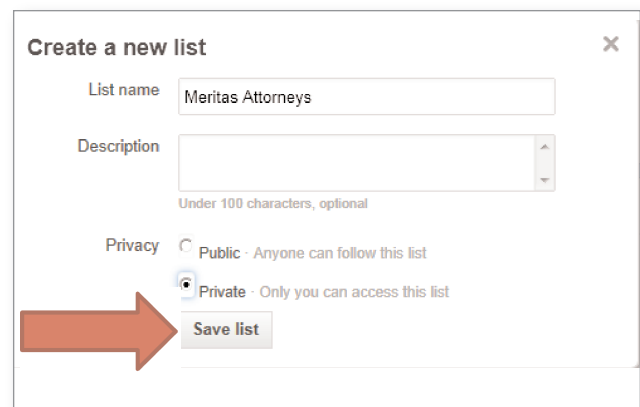
Lists also allow the user to monitor a person without officially “following” that person. This can be useful if the user wishes to monitor competitors or gather specific market research.

### Creating Twitter Lists

1. After establishing a Twitter account, go to the  icon, located at the top right-hand corner of your Twitter home page.
2. Select the downward arrow on the  icon, which will pull down a menu.
3. Select **Lists**, which is the second option on the pull-down list.
4. Select **Create list**, which is located just below your name and information:




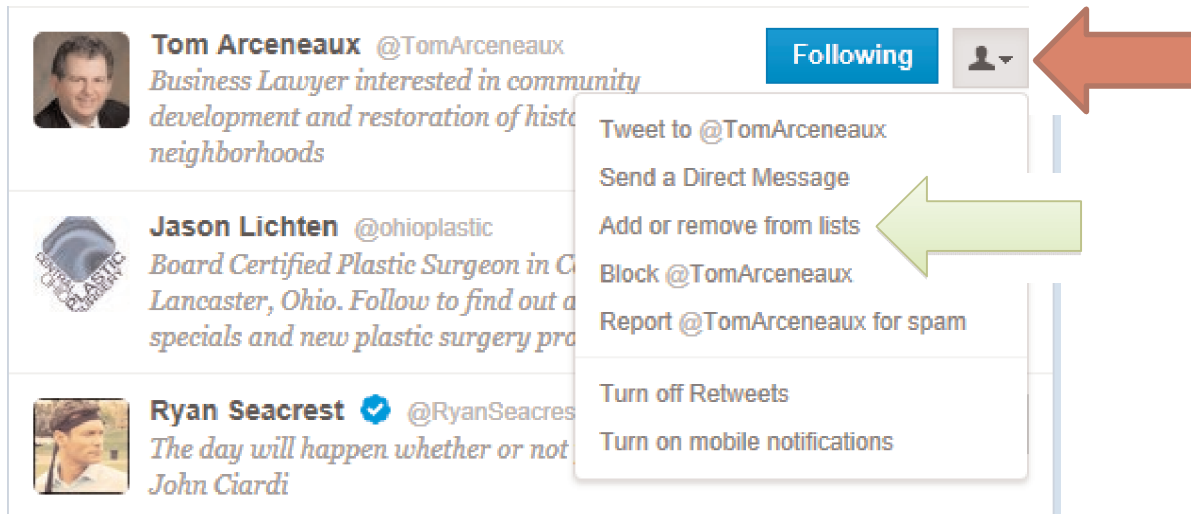
5. A window will open with a prompt to enter **List name**. Type in a title for this List (i.e., Meritas Attorneys, etc.). The name of the List cannot exceed 25 characters, and cannot begin with a numerical character. The user has the option to describe the List and choose whether it is Public (anyone on Twitter can subscribe to or follow this List) or Private (only the user can access the List).
6. Select **Save list**. Repeat the steps in this section to create more Twitter Lists.





## Adding Users to Twitter Lists

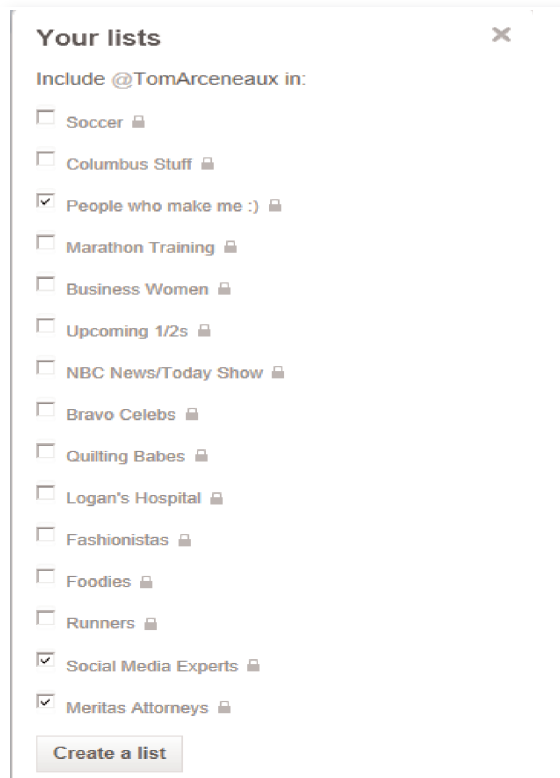
1. To add a Twitter user to a List, select the downward arrow on the  icon to the right of the user's name. Select **Add or remove from lists** from the pull-down menu.



2. Users can select the List(s) they want to add a person to by selecting the empty box next to the desired List(s). A checkmark will appear in the box. Once users have selected the List(s) to add that person to, they select the *x* at the top right to close that window. Their choices will be saved.
3. Follow the same procedure to add other Twitter users to the various Lists.

## Viewing Lists

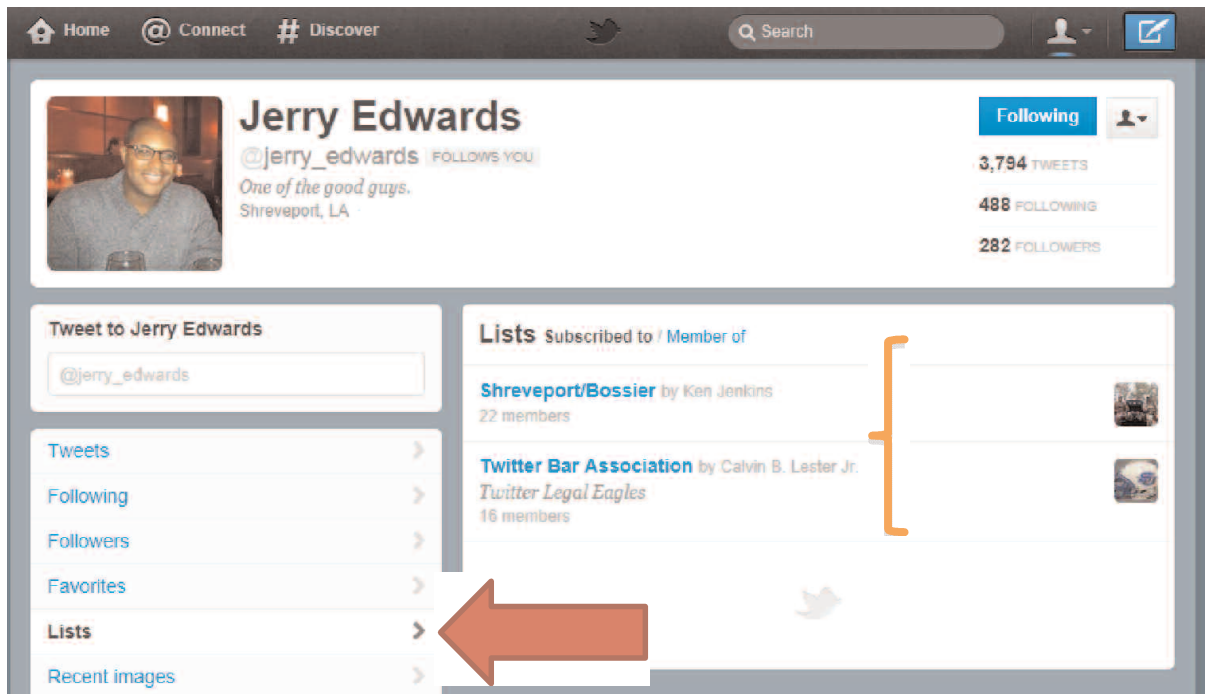
1. To view the Tweets from the group of people in the Lists, go to the user's home page.
2. Select **Lists** on the left-hand side of the screen.
3. Select the desired List, and a stream of Tweets only from the members of that List will appear on the screen.





## Subscribing to Other People's Lists

1. To follow a List, select a user's name until you reach that person's Twitter home page.



2. Choose the **Lists** tab on the left-hand side of the screen, and the Lists that person subscribes to will appear on the right-hand side of the screen.
3. After selecting a List of interest, select **Subscribe** in the upper left-hand corner by the List's title. The user is now a follower of that List.

## Practice Tips for Active Twitter Use

- ✓ Under no circumstances should confidential information, client names, or other information that may be privileged or considered legal advice be published through Twitter. In this regard, lawyers should consult the applicable rules of professional responsibility to ensure that the content of all Tweets complies with any rules concerning confidentiality or commercial speech.
- ✓ To maintain an audience (a.k.a. followers), lawyers or firms should Tweet frequently. A Twitter account associated with a law firm without frequent Tweets may create the image that the law firm itself is not active.
- ✓ A law firm or individual lawyer should follow other Twitter accounts owned by persons/entities in the legal industry, which will generate increased awareness of the follower's Twitter account.
- ✓ A law firm or individual lawyer should seek out and follow other Twitter accounts owned by clients and other professional firms related to his or her practice area, along with media outlets, and, in some jurisdictions, courts to receive information that may have an impact on a practice area or client.
- ✓ In the **Bio** section of the account profile, individuals or firms should insert a written profile of the account holder and include a disclaimer that they are not offering legal advice.
- ✓ A picture or logo (subject to the approval of the law firm if the logo is owned by the law firm) should be uploaded to identify the account.
- ✓ The background/theme of the account holder's page may be customized to reflect the nature of the Twitter account.
- ✓ A Twitter badge may be placed on a law firm or individual web site so that Internet users can easily find the associated Twitter account.
- ✓ A law firm should designate someone to Tweet regularly. Each Tweet should be approved before being sent out by the person or persons at the firm with the authority to approve public announcements.
- ✓ Tweets by individual lawyers should always be written in the first person singular ("I"). References to "We" or "Our" may create confusion as to whether the individual account holder is speaking on behalf of the firm. The law firm should require that any Tweets containing information about the firm be approved by the person or persons at the firm with the authority to approve public announcements.

# 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

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