

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 21st-century way to select lawyers and outside counsel.

The first edition of the *Guide* featured a “Best Practices Guide” on how law firms and individual lawyers can use social media to add value and generate business. The *Guide* also provided step-by-step instructions for effectively using the “Big Three”—LinkedIn, Facebook, and Twitter—and sample social media policies for law firms as they established parameters for social media use within their firms. Basically, that first edition served as a “Social Media 101.” We have incorporated the majority of that text within this edition for those just diving into the social media pool.

With this second edition, the 2010-2011 Leadership Institute elevates Meritas to the second level of social media use. It shows lawyers and law firms how to harness social media to their advantage by integrating “traditional” media with these new technologies to further expand visibility and exposure. As with the first edition, the goal is not to convince lawyers that social media is the only tool for business development, but rather to demonstrate how social media can serve as yet another tool in a lawyer’s marketing toolbox. Accordingly, version 2.0 of the *Guide* features:

- A list of Facebook’s new features, including Timeline and the new privacy settings,
- Step-by-step guides for creating and using LinkedIn Groups and Twitter Lists, and
- Tips for effectively using social media to share “traditional” marketing materials.

We hope you enjoy the *Social Media Guide for Lawyers v. 2.0*, and we welcome any feedback.

The 2010-2011 Leadership Institute

How-To Guide to Social Media Platforms





LINKEDIN FOR LAWYERS

LinkedIn is a business-oriented social networking site with a membership of more than 50 million professionals from around the world, representing 150 industries. LinkedIn serves as an online resumé, offers the ability to network with business professionals, and supports discussion threads on topics relevant to lawyers, law firms, and the business community. Lawyers and law firms can use LinkedIn to “connect” with people they know and trust, and as an online resource to make introductions with mutual contacts.

The primary benefit of LinkedIn is its focus on business networking, as opposed to social interaction. On the other hand, the amount of personal online interaction between LinkedIn users is limited.

Create a LinkedIn Account

1. Go to <http://www.linkedin.com>
2. Select **Join Today** in the top menu bar.
3. Complete the necessary fields (first name, last name, password and email) and select **Join LinkedIn** (or **Join Now**).

4. A new page will appear. Complete the necessary fields (country, professional title, firm name) and select **Create my profile**,

5. LinkedIn will send an email to the address provided. Select **Finish Your Profile** in the email to activate the account. The LinkedIn login page will appear. Enter the email and the password provided to LinkedIn in step 3.
6. The Add Position page will appear. Fill out the necessary fields (firm name, title/position, city, time period with the firm, and a description of the position). Select **Save Changes**.
7. The user now has a basic account with a very limited profile. To maximize the potential of LinkedIn, complete the profile, and update it as events and/or changes occur..
8. LinkedIn can automatically generate requests to connect based on the names of individuals in a lawyer's email contact list, depending on the firm's email security settings (this process may require help from the IT department). Lawyers do not have to permit LinkedIn to review the contacts in their office email accounts. Connecting the office email contact list simply aids lawyers in making quicker connections on LinkedIn.

Completing A LinkedIn Profile

Lawyers should follow these steps to explain who they are and what they do. After they enter information, LinkedIn will suggest individuals they might already know as potential connections.

1. Begin by hovering over **Profile** near the upper left corner of the screen. A selection of choices will appear. Select **Edit Profile**.
2. On the **Edit Profile** screen, users can list education, past places of employment, web site addresses, personal information, etc. The amount of information disclosed is up to the user, but the requested information is generally content that would be found on a professional resumé. Users also will be given the opportunity to provide a Summary of themselves, which can be roughly similar to short-form biography from a web page.

3. Photos can be added to a profile. From the **Edit Profile** view, select **Add Photo**, which is located just above the grey, faceless silhouette. A new page will open. Users can select **Choose File** to browse from files on their computer for a photo of themselves, then select **Upload Photo** to make it their LinkedIn profile photo.



Start Making Connections

Once users are satisfied with their profile, they should begin making connections.

1. The upper right search bar allows browsing of LinkedIn in various ways. The left side of that search bar allows users to select People, Companies, Jobs, and other categories. Users can start with People and begin inputting their colleagues, family, and professional associations.
2. Searches will generate a list of relevant profiles of people with whom users may connect. There are often several profiles for the same name, so they should look for the ones that match the present location and place of employment of the persons for whom they are searching. Selecting the names will bring up abbreviated versions of their profiles and confirm that they are people with whom the user wants to connect.
3. Once users feel comfortable that they have found the right profile, they can select the link on the right **Add to Network**. They will be taken to a page that will generate a connection request and will have the option of specifying how they know the person (i.e., Friend, Colleague, We've Done Business Together, etc.) and sending a brief note. It is acceptable LinkedIn etiquette to not personalize the note and simply use the form version.
4. To sign out, hover the cursor over the user's name in the upper right hand corner. Two selections appear. Select **Sign Out**.

Establish LinkedIn Privacy Settings

Because LinkedIn does not solicit much personal (i.e., non-work related) information, which can in any event be omitted, there are relatively minimal privacy concerns. A profile will likely end up conveying information very similar to what a visitor to a firm's web site would find on a lawyer's personal page. However, if a user has privacy concerns and wishes to establish some privacy settings, hover the cursor over the user's name in the upper right corner and a list appears. Select **Settings**. A new screen appears and the user has a series of privacy controls to choose from at the bottom of the screen.

LinkedIn Groups & Discussion Forums

LinkedIn allows users to create Groups of LinkedIn members with similar interests and affiliations, providing a forum for them to interact with each other. While joining a Group enables the user to see other members' profiles, it does not automatically add all of the Group's members to a user's Contacts.

Many organizations establish Groups, including Meritas, universities, and professional organizations, as do users in areas of common interest (i.e., law and technology, social media, etc.). LinkedIn Groups allow a user to:

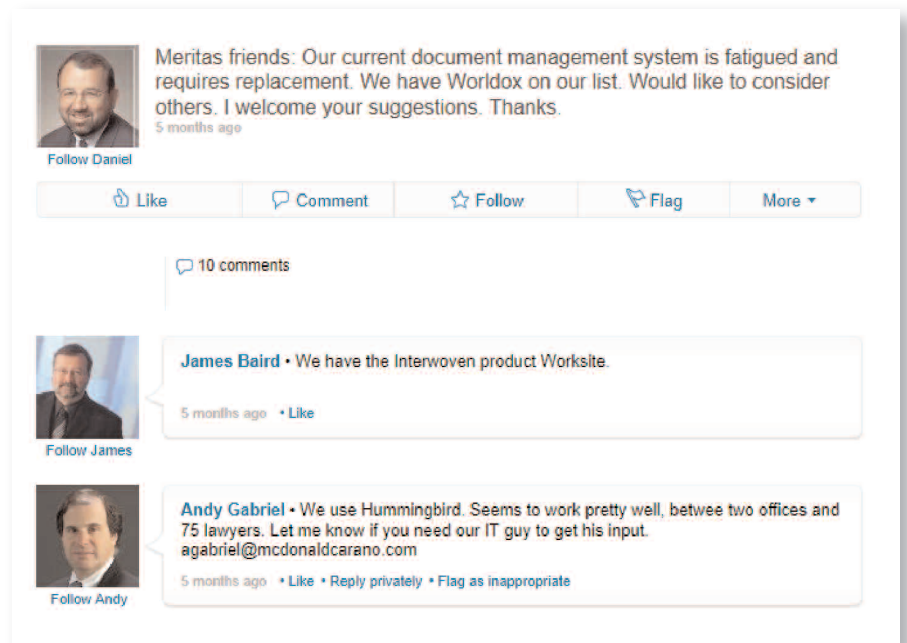
- Discover the most popular discussions in the user's professional groups.
- Take an active part in determining the top discussions by commenting and "liking" comments.
- Follow the most influential people in the user's group by checking the Top Influencers board for the group.
- Find interesting discussions by seeing who "liked" a discussion and how many people have commented on the discussion thread.
- Allow users to re-connect and network through forums.
- Permit a user to demonstrate an area of knowledge and expertise.
- Locate potential talent for an organization.

The Meritas Group discussion board is often used as a sounding board for firm management, hot legal topics, or finding a Meritas lawyer that has relevant experience in a particular area.

The screenshot displays the LinkedIn interface for the 'Meritas: Law Firms Worldwide - Members Only' group. At the top, the LinkedIn logo and account type are visible. The navigation bar includes 'Home', 'Profile', 'Contacts', 'Groups', 'Jobs', 'Inbox', 'Companies', 'News', and 'More'. The group name and 'Members Only' status are prominently displayed. Below the group name, there are tabs for 'Discussions', 'Members', 'Promotions', 'Jobs', 'Search', and 'More...'. A search bar is located on the right side of the group header. The main content area is divided into several sections: 'Search members' with a search box and 'Advanced Search' link; 'New Members: Last 7 Days' featuring a profile for Richard Victoria; 'Group Statistics' with a call to action 'CHECK OUT INSIGHTFUL STATISTICS ON THIS GROUP'; 'This Week's Top Influencers' with a blue banner and profiles of Ethan Wall, Tanna Moore, and David Scott; and a 'Members (646)' list showing profiles of Ethan Wall, Tanna Moore, and David Scott with their respective titles and follower counts.



Membership in a LinkedIn Group allows the user to participate in Discussions. Discussions are similar to “traditional” discussion board forums where members of the Group can post comments and responses in a threaded discussion. Discussions are only visible to the members of the Group and only members of the Group can contribute to a discussion thread. The Group Owner can edit or redact comments within the discussion thread.



Creating a Group

Users can easily create their own Group for an organization or an area of interest. To create a Group:

1. Hover over **Groups** at the top of the LinkedIn page.
2. Select **Create a Group**.
3. Name the Group and upload a logo.
4. Use the pull-down menu to choose a **Group Type** (alumni, corporate, conference, networking, nonprofit, professional, or other).
5. Enter a brief description of the Group into the Summary that will appear in the Groups directory.
6. Enter a full description of the Group in the Description area that will appear on the Group page.
7. Enter a web site for the organization, if applicable.
8. Enter the email address for the Group Owner.

9. Users can determine how LinkedIn members can access the Group. The Group Owner can select **Auto-Join**, which permits anyone to join the Group without needing approval, or **Request to Join**, where a user must request to be approved by the Group Owner. The latter option allows the Group Owner to give additional Group members administrative control over the Group (send invitations, accept requests to join the Group, change logo, etc).

*Access:

- Auto-Join:** Any LinkedIn member may join this group without requiring approval from a manager.
- Request to Join:** Users must request to join this group and be approved by a manager.

Display this group in the Groups Directory.

Allow members to display the logo on their profiles. Also, send your connections a Network Update that you have created this group.

Allow members to invite others to join this group.

Pre-approve members with the following email domain(s):

Groups You May Like

LinkedIn provides a Groups You May Like feature that suggests relevant Groups based on information contained in the user's profile. To access this feature, select the **Groups** icon at the top of the LinkedIn page, and select **Groups You May Like**. A list of suggested Groups will appear.



Practice Tips for Active LinkedIn Use

The primary purpose of LinkedIn is not simply to serve as a place to post a resumé; the firm web page already does that. It is to make and expand connections through LinkedIn's Contacts features. By uploading a personal email contacts folder, searching in the upper right screen search box, and allowing LinkedIn to suggest people, lawyers can connect with other trusted LinkedIn users and expand their valuable professional network. Here are some tips:

- ✓ Notably, LinkedIn does *not* encourage connecting with people the user does not know. People with whom a lawyer wants to connect must affirm the request, and lawyers must accept any incoming requests before they are connected. Once people affirm a user's request, the user will be able to see their full Profile and they will be added to the user's LinkedIn Contacts, which can be seen by selecting the **Contacts** tab at the top of the LinkedIn page.
- ✓ A list of Contacts can act as a handy virtual Rolodex of the complete LinkedIn Profiles in a user's network, but the real power of LinkedIn is that the user can search *their contacts'* contacts for people or companies. These common users are known as second- and third-degree connections.

For instance, imagine that a lawyer is connected to George. The lawyer is aware that a company, Gadgetwhiz Enterprises, is facing a particular legal problem that he feels well equipped to handle. The problem? He does not know anyone at Gadgetwhiz. When he selects **Companies** from the drop-down menu next to the LinkedIn search box and types in Gadgetwhiz, he gets a search result displaying an individual's short-form profile with a "2nd" icon by the name. The "2nd" icon indicates that this person, who works at Gadgetwhiz, is only two connections away from the lawyer. By selecting the **1 Shared Connection** link that shows next to the name, the lawyer can see who that shared connection is. If that person is George, that means George is connected to a person who works at Gadgetwhiz. From there, the lawyer can either contact George via traditional means for an introduction, or select the **Get Introduced** link to the right of the search result profile, which allows the introduction to take place electronically and within LinkedIn.

- ✓ LinkedIn also has other functionalities beyond the basics described above, such as Answers, where lawyers can showcase their knowledge and expertise by answering questions.
- ✓ Users can upgrade their accounts by selecting **Upgrade Your Account** at the bottom left, which will permit users to choose from three types of upgraded accounts: **Business**, **Business Plus**, and **Executive**. We recommend users become familiar with the basic LinkedIn account before considering investing \$20 to \$100 a month for an upgrade.
- ✓ Additional information about advanced LinkedIn use can be found on LinkedIn's instructional page at <http://learn.linkedin.com/>.

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!

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