How to Create a Facebook Engagement Policy
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As Facebook has become a primary customer interaction point for businesses, many companies have established formal policies for how community managers and employees should engage with fans. These engagement policies run the gamut from a brief checklist of best practices to a multi-page legal document with detailed instructions on how to handle issues.

Since every company’s goals, style and tone are different, it’s important to develop policies that fit your business. Here are six steps to get you started.

Categorize Posts

The first step in creating engagement guidelines is to categorize the different types of posts you’re likely to see on your page. One approach is to group posts into broad categories — such as praise, complaints, questions and general conversation — so you can create basic guidelines for responding to each.

Ben Foster, VP – Digital Strategist at PR agency Ketchum, recommends going a step further and creating a detailed decision tree for posts. This would include asking questions such as “Does the response include a suggestion for the brand?” and “Is the response positive and favorable to the brand and/or messaging?” and guiding the community manager in how to respond accordingly.

Establish Acceptable Response Times

The next step is determining acceptable response times — depending on the size and nature of your business and fan base, this could range anywhere from a few minutes to a day or more.

Chris Dessi, a Managing Partner at Drive Action Digital, advises clients who are compiling policies with the firm to address any issues arising on Facebook within (at most) an hour. “Even if you have no idea how to address the issue, people need to know you’re aware of it, or they may take to the virtual streets,” he cautions.

Your response times should also be driven by the type of post you’re responding to, with complaints and questions taking priority over praise and general conversation. Meaghan Clawsie from interactive marketing and advertising agency Smartycake suggests that even if you aren’t able to answer someone’s question immediately, you should at least let them know right away that you’ll respond soon with an answer. She also recommends that companies with busy pages assign multiple people the responsibility of responding to fan inquiries, including having someone manage the page at night if necessary to respond outside of normal business hours.
Develop Guidelines for Resolving Issues

How you respond to issues is just as important as how fast you respond.

Jesse Chemtob, engagement manager at wine site Snooth.com, recommends guiding community managers to take conversations offline (to e-mail or a phone conversation) when resolving issues.

Heather Whaling of Geben Communication agrees. “Your policy should differentiate between a ‘troll’ and constructive criticism. If someone leaves a viable complaint or feedback on your Facebook Page, respond. Odds are, someone else shares their concerns, so you want the company response to be accessible for everyone else to read. But don’t get into a heated back and forth. If the situation continues to escalate, ask the person to contact you by phone or e-mail so you can find a solution to their individual problem.”

In some cases, you may also want a manager to weigh in before responding to inaccurate, accusatory or negative comments about the company. Starr Hall, author of “Get Connected: The Social Networking Toolkit for Business“, suggests developing a formal review and approval process for responses in these types of situations.

Create a Process for Handling Inquiries

Inevitably, your Facebook Page will garner customer service inquiries even if this is not the primary purpose of the page. You can minimize this issue by clearly posting your customer service URL and phone number on your page. BigCommerce, an e-commerce software provider, went as far as to integrate its customer service URL into the main image on its Facebook Page. You should also come up with a stock response to customer service inquiries that includes a link, address and/or phone number where the fan can direct their inquiry.

You may also generate reporter queries on the page or about your program – make sure your community manager and team have a process for promptly responding to (or handing off) these types of requests.
Set Clear Ground Rules For Fan Posts

Foster recommends creating an external policy for fan comments, with stated guidelines on the “Info” tab about what constitutes objectionable content and how you will handle offensive or inappropriate posts. And while some social media advocates say that you should never delete negative comments, according to Krista Neher, CEO of BootCampDigital, this isn’t always the best route.

“One of my clients was constantly attacked by a consumer advocacy group that totally detracted from the actual conversations happening on the page by the fans,” said Neher. “They adopted a policy of deleting those comments and created a clear policy on what was or wasn’t appropriate. In addition, the commenters were notified about the policy and given other groups or discussions where their comments would be more appropriate.”

Neher also recommends creating a policy for what your employees can post on the page. This policy should include what is or isn’t OK to post about work, suppliers, vendors, customers, coworkers or your boss. “I have seen many posts that are thinly veiled complaints about workplaces disguised as questions or general comments,” says Neher. “Make sure that your employees know what they can and can’t post as well as the potential implications.”

Set the Appropriate Tone

Once you’ve established the ground rules for when and how to engage, the final step is providing guidelines for what to say and how to say it. Successful engagement typically involves being open, friendly and authentic. Clawsie coaches clients to “think of their Facebook Page as a dinner party, and they are the charming, engaging and witty hosts. Their job is to make everyone feel comfortable and to facilitate interaction.”

Michelle Cox, vice president of marketing at Metacafe, suggests that brands “keep it real. Be true to your brand personality. Today’s consumers are savvy and seek a relationship with the brands they trust. Be genuine in your tone and straightforward with your message.” This approach appears to be working: Metacafe reports that one-third of the 70,000+ fans on the Metacafe Movies Page regularly engage with the brand.