SOCIETY OF ACTUARIES

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Social Media Guidelines

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At rein4ce, we feel that social media should be part of the public relations (PR) offering—and we help clients get to grips with it. Some say you don't get something for nothing—well that is not true. Today we are feeling generous.

And the first thing we do is issue guidelines for staff— they need to know where they stand, and management needs to draw a line in the sand to legally protect their company.

Today, below, you will find sensible social media guidelines to use in your company. This will not only help your employees know what they are and are not allowed to do, but also help you with risk management by ring-fencing your company from inappropriate behaviour from rogue staff (and it happens, I tell you). Here below I've pasted a short set of rules, and a longer set of guidelines. They are based a lot on common sense, other guidelines we have come across and are the ones we use here at rein4ce and sister company Breen Media for our staff.

So … (drum roll …)

FREE GUIDELINES!

Social Media Guidelines
This is a guideline document for corporate use of Blogs, wikis, social networks, and social media

Responsible engagement
Whether or not a user chooses to create or participate in a blog, wiki, online social network or any other form of online publishing or discussion is his or her own decision.

However, online collaboration platforms are fundamentally changing the way we work and engage with each other, clients and partners and therefore the company has issued these guidelines for the use of such platforms.

Summary
1. Know and follow our (INSERT LINK TO OWN CORPORATE GUIDELINES) corporate guidelines. The same rules apply online.

2. Users are personally responsible for the content they publish on blogs, Facebook LinkedIn, Twitter or any other form of user-generated media.

3. Identify yourself—name and, when relevant, role within the organisation—when you discuss company or company-related matters. You must make it clear that you are speaking for yourself and not on behalf of the company.

Respect copyright, fair use and financial disclosure laws.
1. Don't provide our or another's confidential or other proprietary information. Ask permission to publish or report on conversations that may be deemed to be private or internal to the company.

2. Don't cite or reference clients, partners or suppliers without their approval. When you do make a reference, where possible link back to the source.
3. Don't use ethnic slurs, personal insults, obscenity, or engage in any conduct that would not be acceptable in our workplace.

General Social Media Good Practice
1. Respect your audience. You should also show proper consideration for others' privacy and for topics that may be considered objectionable or inflammatory—such as politics and religion.
2. Be aware of your association with the company in online social networks. If you identify yourself as an employee, ensure your profile and related content is consistent with how you wish to present yourself with colleagues and clients.
   1. Don't pick fights, be the first to correct your own mistakes, and don't alter previous posts without indicating that you have done so.
   2. Try to add value. Provide worthwhile information and perspective. The company is best represented by its people and what you publish may reflect on the company.
   3. Be mindful that what you publish will be public for a long time, whether on pictures, video or written word. Protect your privacy.
   4. If you publish content to any company website outside of the company and it has something to do with work you do or subjects associated with

the company, use a disclaimer such as this: "The postings on this site are my own and don't necessarily represent the company's positions, strategies or opinions."

SOCIAL MEDIA GUIDELINES:

Our Business Conduct Guidelines and laws provide the foundation for Our policies and guidelines for blogs and social computing. The same principles and guidelines that apply to users' activities in general, as found in our Business Conduct Guidelines, apply to users' activities online. This includes forms of online publishing and discussion, including blogs, wikis, file-sharing, user-generated video and audio, virtual worlds and social networks.

As outlined in the Business Conduct Guidelines, we fully respect the legal rights of our employees in all countries in which we operate. In general, what you do on your own time is your affair. However, activities in or outside of work that affect your job performance, the performance of others, or our business interests are a proper focus for company policy.

We support open dialogue and the exchange of ideas. We regard blogs and other forms of online discourse as primarily a form of communication and relationship among individuals. When the company wishes to communicate publicly as a company—whether to the marketplace or to the general public—it has well established means to do so. Only those officially designated by the company have the authorisation to speak on behalf of the company.

However, we believe in dialogue among employees and with our partners, clients, members of the many communities in which we participate. Such dialogue is inherent in our business model of innovation, and in our commitment to the development of open standards. We believe employees can both derive and provide important benefits from exchanges of perspective.

One of our employees' core values is "trust and personal responsibility in all relationships." As a company, we trust—and expect—employees to exercise personal responsibility whenever they participate in social media.

This includes not violating the trust of those with whom they are engaging. Users should not use these media for covert marketing or public relations. If and when members of our Communications, Marketing, Sales or other functions engaged in advocacy for the company have the authorisation to participate in social media, they should identify themselves as such.

What does an employee's personal responsibility mean in online social media activities? Online social media enables individuals to share their insights, express their opinions and share information within the context of a globally distributed conversation. Each tool and medium has proper and improper uses. While we encourage all of our employees to join a global conversation, it is important for employees who choose to do so to understand what is recommended, expected and required when they discuss company-related topics, whether at work or on their own time.

Know Our Business Conduct Guidelines. If you have any confusion about whether you ought to publish something online, chances are the BCGs will resolve it. Pay particular attention to what the BCGs have to say about proprietary information, about avoiding misrepresentation and about competing in the field. If, after checking the BCG's, you are still unclear as to the propriety of a post, it is best to refrain and seek the advice of management.

Be who you are. Some bloggers work anonymously, using pseudonyms or false screen names. The company discourages that in blogs, wikis or other forms of online participation that relate to our company, our business or issues with which the company is engaged. We believe in transparency and honesty. If you are blogging about your work for our company, we encourage you to use your real name, be clear who you are, and identify that you work for our company. Nothing gains you more notice in the online social media environment than honesty—or dishonesty. If you have a vested interest in something you are discussing, be the first to point it out. But also be smart about protecting yourself and your privacy. What you publish will be around for a long time, so consider the content carefully and also be judicious in disclosing personal details.

Be thoughtful about how you present yourself in online social networks. The lines between public and private, personal and professional are blurred in online social networks. By virtue of identifying yourself as an employee within a social network, you are now connected to your colleagues, managers and even our clients. You should ensure that content associated with you is consistent with your work at our company. If you have joined the company recently, be sure to update your social profiles to reflect our guidelines.

Speak in the first person. Use your own voice; bring your own personality to the forefront; say what is on your mind.

Use a disclaimer. Whether you publish to a blog or some other form of social media, make it clear that what you say there is representative of your views and opinions and not necessarily the views and opinions of the company. At a minimum in your own blog, you should include the following standard disclaimer: "The postings on this site are my own and don't necessarily represent the company's positions, strategies or opinions."

Managers and executives take note: This standard disclaimer does not by itself exempt managers and executives from a special responsibility when blogging. By virtue of their position, they must consider whether personal thoughts they publish may be misunderstood as expressing company positions. And a manager should assume that his or her team will read what is written. A public blog is not the place to communicate our policies to company employees.

Respect copyright and fair use laws. For the company's protection as well as your own, it is critical that you show proper respect for the laws governing copyright and fair use of copyrighted material owned by others, including our own copyright and brand. You should never quote more than short excerpts of someone else's work. And it is good general blogging practice to link to others' work. Keep in mind that laws will be different depending on where you live and work and that our company has offices in many jurisdictions.

Protecting confidential and proprietary information. Social computing blurs many of the traditional boundaries between internal and external communications. Be thoughtful about what you publish—particularly on external platforms. You must make sure you do not disclose or use confidential or proprietary information or that of any other person or company in any online social computing platform. For example, ask permission before posting someone's picture in a social network or publishing in a blog a conversation that was meant to be private.

Our business performance. You must not comment on confidential financial information such as future business performance, business plans, or prospects anywhere in world. This includes statements about an upcoming quarter or future periods or information about alliances, and applies to anyone including conversations with Wall Street analysts, press or other third parties (including friends). Our policy is not to comment on rumours in any way. You should merely say, "no comment" to rumours. Do not deny or affirm them—or suggest either denial or affirmation in subtle ways.

Protect our clients, business partners and suppliers. Clients, partners or suppliers should not be cited or obviously referenced without their approval. Externally, never identify a client, partner or supplier by name without permission and never discuss confidential details of a client engagement. Internal social computing platforms permit suppliers and business

partners to participate so be sensitive to who will see your content. If a client hasn't given explicit permission for their name to be used, think carefully about the content you're going to publish on any internal social media and get the appropriate permission where necessary.

It is acceptable to discuss general details about kinds of projects and to use non-identifying pseudonyms for a client (e.g., Client 123) so long as the information provided does not make it easy for someone to identify the client or violate any non-disclosure or intellectual property agreements that may be in place with the client. Furthermore, your blog or online social network is not the place to conduct confidential business with a client. Respect your audience and your co-workers. Remember that we are a global organisation whose employees and clients reflect a diverse set of customs, values and points of view. Don't be afraid to be yourself, but do so respectfully. This includes not only the obvious (no ethnic slurs, personal insults, obscenity, etc.) but also proper consideration of privacy and of topics that may be considered objectionable or inflammatory—such as politics and religion. For example, if your blog is hosted on company-owned property, avoid these topics and focus on subjects that are business-related. If your blog is self-hosted, use your best judgment and be sure to make it clear that the views and opinions expressed are yours alone and do not represent the official views of the company. Further, blogs, wikis, virtual worlds, social networks, or other tools hosted outside of our protected Intranet environment should not be used for internal communications among fellow employees. It is fine for employees to disagree, but please don't use your external blog or other online social media to air your differences in an inappropriate manner.

Add value. The company is best represented by its people and everything you publish reflects upon it. Blogs and social networks that are hosted on company-owned domains should be used in a way that adds value to our business. If it helps you, your co-workers, our clients or our partners to do their jobs and solve problems; if it helps to improve knowledge or skills; if it contributes directly or indirectly to the improvement of our products, processes and policies; if it builds a sense of community; or if it helps to promote our values, then it is adding value. Though not directly business-related, background information you choose to share about yourself, such as information about your family or personal interests, may be useful in helping establish a relationship between you and your readers, but it is entirely your choice whether to share this information.

Don't pick fights. When you see misrepresentations made about the company by media, analysts or by other bloggers, you may certainly use your blog—or join someone else's to point that out. Always do so with respect, stick to the facts and identify your appropriate affiliation to the company. Also, if you speak about a competitor, you must make sure that what you say is factual and that it does not disparage the competitor. Avoid unnecessary or unproductive arguments. Brawls may earn traffic, but nobody wins in the end. Don't try to settle scores or goad competitors or others into inflammatory debates. Here and in other areas of public discussion, make sure that what you are saying is factually correct.

Be the first to respond to your own mistakes. If you make an error, be up front about your mistake and correct it quickly. In a blog, if you choose to modify an earlier post, make it clear that you have done so.

Use your best judgment. Remember that there are always consequences to what you publish. If you're about to publish something that makes you even the slightest bit uncomfortable, review the suggestions above and think about why that is. If you're still unsure, and it is related to company business, feel free to discuss it with your manager. Ultimately, however, you have sole responsibility for what you post to your blog or publish in any form of online social media.

And finally… don't forget your day job. You should make sure that your online activities do not interfere with your job or commitments to customers.