CPA Practice **Advisor**

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for every firm. Even if your firm is not using social media, you still need a policy because your staff are using it in their private lives and they need guidelines to protect your interests and your firms' reputation.

Sandra Wiley • Dec. 09, 2013

From the Bridging the Gap blog.

Having a social media policy, and training employees to follow it, are critical practices for every firm. Even if your firm is not using social media, you still need a policy because your staff are using it in their private lives and they need guidelines to protect your interests and your firms' reputation.

Before creating a social media policy, firm's should decide what they want to get out of social media. It should speak to every type of communication employees publish on the Internet, including Facebook, LinkedIn, Twitter, blogs, wikis, Instagram and YouTube to name some of the most popular. Any or all of these could impact your firm.

As you develop the policy, insure that you have the companies overall goals in place as well as tapping into various areas of the firm professional team including marketing, human resources, technology and possibly legal counsel. Begin by looking at the employee handbook to see if social media would affect any other policies and change them to meet your new social media policy.

Your policy should cover whether the firm will use social media to screen candidates or employees and the inherent risks involved. Employees need to be informed as to whether they need approval before posting information and identify whom they should get approval from. Be careful when determining if your firm will use the internet as a form of screening candidates or ongoing checks on current employees. Firms could discover information on one of the online sources that are protected

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A few things to consider as you write your policy:

- State that employees are not to divulge firm and client information and provide examples of policy violations.
- State that employees can be held accountable for content they pot on the Internet

 whether in the office, at home or on their own time particularly if something
 they post or share violates other firm policies
- Cover the legal consequences for employers and disciplinary ramifications for employees if rules are not met.
- State that the policy is not a static document. It may have to be revised as laws and usage change, new platforms are introduced and existing platforms expand.
- Clearly and succinctly educate employees about social networking's benefits as well as pitfalls.
- Set forth employee productivity expectations in conjunction with their social media habits.
- Inform employees as to whether they need approval before posting certain types of information and identify whom they should get approval from.
- Convey to employees that they are essentially ambassadors for the firm's brand, because what they write on social media sites may be disseminated to the world – even if they only share it with their friends.

Encourage employees to think twice before posting comments they would not say out loud or that they would not want their managing partner, spouse, or grandparents to see.

Finally, do not just give employees the policy and have them read it. You need to have training, because you can't trust that everyone will read the written policy.

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