

# Social Media Guidelines for PMI Chapters

Through global advocacy, collaboration, education and research, Project Management Institute (PMI) works to prepare more than three million professionals around the world for the Project Economy: the coming economy in which work, and individuals, are organized around projects.

For many members, chapters are the true “face” of PMI. Social media is an exciting and powerful way for chapters to engage with members and potential members.

As a companion document to these guidelines, we recommend reading the [PMI Social Media Guidelines for Volunteers](#).

## BEFORE YOU BEGIN

There are many social media platforms your chapter can leverage. While it may seem that having a strong social media presence means staking out your space on as many networks as possible, it is actually better to have a well-maintained presence on just a few networks which are valued by your target audience rather than a weak presence on many. While it’s a great idea for your chapter to thoughtfully experiment with new types of social media, you should also not be afraid to close social networks that are not successful.

Before creating a profile on a social media platform, ask yourself these questions to determine if a presence for your chapter is warranted:

- What are your chapter’s business goals? Can social media help you accomplish those goals?
- What social media platforms does your target audience prefer? You could find out by asking at a well-attended chapter meeting or by surveying your chapter members.
- Do you have the resources to keep your content fresh and provide moderation and interaction?

## CREATING A STRATEGY

Your social media goals should be clearly related to your chapter’s goals. Once you’ve identified your goals, it’s time to put together your social media strategy. Your goals tell you where you want to go and your strategy will tell you how to get there. Example:

<b>Chapter Goal</b>	Where to?	Increase membership retention
<b>Social Media Goal</b>	Where to?	Demonstrate the value of belonging to our PMI chapter
<b>Social Media Strategy</b>	How?	Make it easier for chapter members to participate in meetings
<b>Social Media Tactic</b>	What?	Broadcast chapter meetings on Facebook Live and let members participate remotely via chat. Create a members-only Facebook group for networking in between meetings.

## Recommended Resources:

- **Content Marketing Institute:** [How to Create a Strategic Social Media Plan](#)
- **BufferApp:** [How to Create a Social Media Marketing Strategy for 2019 and Beyond](#)
- **SproutSocial:** [How to build your social media marketing strategy for 2020](#)
- **Hootsuite:** [How to Create a Social Media Strategy in 8 Easy Steps](#)

## SETTING YOURSELF UP FOR SUCCESS

Set up your social media presence thoughtfully. This includes your (1) branding and profile, (2) moderation policies and (3) administrative settings.

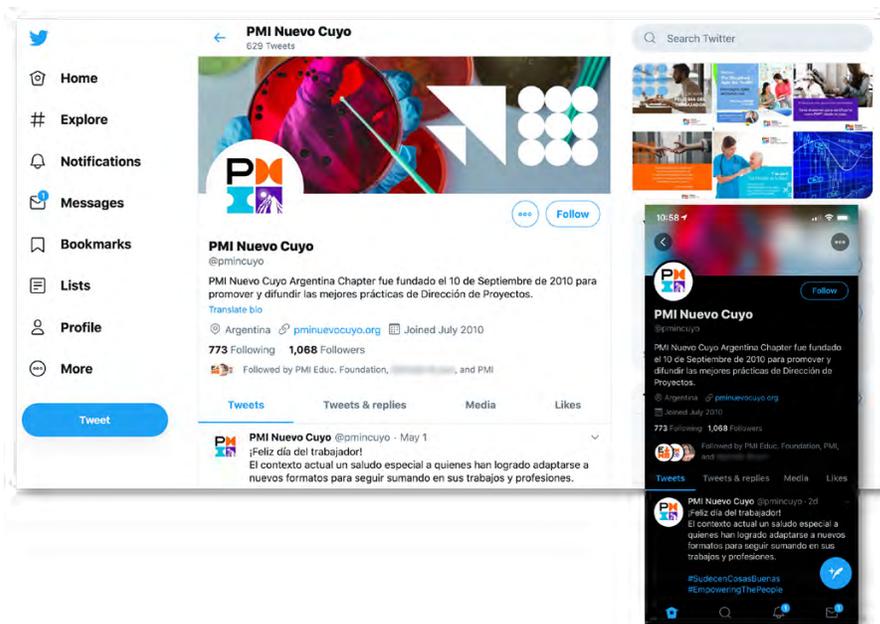
### 1. Branding and profile

Brand standards, applied consistently, help PMI project a strong identity and differentiate from its competitors. Proper use of the PMI logo on the web, including social media spaces, is critical to maintenance of brand standards. Chapters can benefit from PMI's efforts around branding by visually identifying themselves with the PMI brand.

**To ensure proper branding of your chapter social media sites, please see *Visual Identity Guidelines*, available on the [PMI Marketing Portal](#).**

Here is an example of a correctly branded PMI Chapter Twitter profile as it appears on desktop and mobile. Although the example below is from Twitter, these rules can be applied to any social media property. You will notice that this profile:

- Follows PMI Chapter Brand Guidelines for graphic elements, including use of PMI custom imagery for the cover photo and use of symbols
- Thoughtful choice of a social media handle and clear identification of the full chapter name
- A well-written chapter description
- A link to the official chapter website
- Recent use of the social media property (current content)



### 2. Moderation Policies

Create moderation policies so that community members know what is and is not acceptable in each space. Abide by the policies you create. As an example, see [PMI's LinkedIn Group Rules](#) in the *About this group* section.

Regularly monitor your own chapter-branded social media properties. Choose a moderation approach that is best suited for your chapter, your audience and the objective of the social media community.

For example, the moderation approach for your chapter Twitter feed could be having the moderator check @mentions and direct messages once per day, answer each question or complaint, congratulate chapter members who share good news and report spammers through Twitter’s official channels.

### 3. Administrative Settings

Administrative settings are crucial to how your social channels function. Be conscientious about reviewing all the administrative settings for your social media space. Use the help documentation provided by each social network to understand the options if necessary. For example, on Facebook, you can enable or disable the ability to receive direct messages from your fans. The choice of whether or not to receive messages directly from your social media community should be based on whether you have customer care personnel or community managers who are able to monitor and respond to direct messages.

## ENGAGING YOUR SOCIAL MEDIA COMMUNITY

Engagement with your social media community can take many forms. The two basic forms are proactive and reactive. Proactive posts are original or curated content shared by your chapter. It is highly recommended that you create an editorial calendar that will add structure to your proactive posts.

Reactive engagement is all about responding to posts and questions submitted by your social media community members and often centers on customer service.

- Setting a posting cadence and specific time of day to “check in” can help ensure a structured approach to posting.
- Familiarize yourself with [PMI’s social media spaces](#) (scroll to bottom of page for links), which produce regular content of interest to the global PMI membership. Curate the content by picking items that you think your audience members will find interesting and use it to fill in the gaps in your content calendar by sharing it on Facebook, re-tweeting it on Twitter and so on.
- Localization is to your advantage. While PMI is a global brand, your chapter members will join your chapter network to hear about local PMI events, learn the latest chapter news, see photos of people they know and to network with local chapter members. Showcase your local content and content produced by your chapter members to create a unique social media space. Mix in other project management material that you feel would be of interest to your chapter members. Always be sure to obtain permission and attribute work properly by linking back to the original source and to respect copyright, fair use and intellectual property laws. Share only reputable content.
- Stimulate visually. Multiple studies have proven photos and videos to be the social objects that elicit the most engagement.
- Mix “heavy” posts (e.g., blogs and videos) with “light” posts (e.g., polls, trivia, and open-ended questions) and your communication strategy will be optimized to drive engagement.

#### Sample posting cadence

- Twitter: 3-5 posts per day at 9, 12 and 3
- LinkedIn: 1 post on Tuesday, Wednesday, Thursday during business hours
- Facebook: 3 posts per week, including on on weekend

\*Note: posting cadence can/should change as you learn which channel drives the most engagement/value for your fans/followers

### Recommended Resources:

- **Hootsuite:** [How to Create a Social Media Content Calendar: Tips and Templates](#)
- **Sprout Social:** [Always Up-to-Date Guide to Social Media Image Sizes](#)
- **CoSchedule:** [Best Times to Post to Social Media](#)

## A WORD ON GOVERNANCE

Good governance practices for running a social media space are easy to overlook, but a few simple steps can make your space safer for everyone and save your chapter trouble in the long term.

- Name multiple administrators to each social media account. If only one administrator can be assigned to the account (such as with Twitter), make sure more than one trusted person holds the username and password.
- Keep your accounts secure by using strong passwords. Do not reply if you receive a suspicious email, instant message or webpage asking you for personal information, such as a username or password.
- Your chapter website should contain links to the social media spaces managed by your chapter. In turn, the social media spaces managed by your chapter should contain links back to your website. This is a way of verifying that your social media spaces are legitimate.

## Recommended Resources

- **Lifehacker:** [How to Create Secure Passwords](#)
- **Consumer Reports:** [Everything you need to know about password managers](#)
- **InspiredLearning:** [Phishing Protection Checklist](#)
- **Forbes:** [Why More Firms Need a Social Media Governance Plan](#)

## MEASURING SUCCESS

You should measure your chapter's social activities so you know what is successful, what is not, and how to improve. There are two views of social media measurement:

- Ongoing analytics give you a general view of how of how your chapter is doing on social media. For example, impressions, engagement rate, or follower growth at a page/account level.
- Campaign metrics provide a view of how targeted marketing activities with specific goals and beginning/end dates are performing. For example, social interactions, link clicks, and engagement rate. Your relevant campaign metrics may vary depending on your campaign goals.

There are many ways to group campaign level metrics. Below, they are broken into awareness, engagement, conversion and impact.

- **Awareness metrics such as impressions and followers.** Awareness is measured through passive metrics, such as blog traffic, inlinks, page likes, impressions and followers, which tells you the likely pool that your social engagement reaches. Using these numbers will provide you with a baseline understanding of your social media community size. Most awareness metrics are available to you through the administrative settings of your social media accounts.
- **Engagement metrics such as clicks, likes, shares, retweets, or comments.** Engagement denotes a more active audience, who signals that they are seeing and consuming your content by taking measurable action, such as commenting, reposting, sharing, mentioning, re-tweeting or liking a post. These are available directly from the analytics provided by social media platforms, such as the Insights tab in Facebook.
- **Conversions such as downloads, event registrations, or membership purchases.** Measuring this requires web analytics tools such as Google Analytics or Adobe Analytics.
- **Impact such as influencing larger conversations or generating revenue.** By looking at correlations between your audiences' activities and key indicators, such as the size of priority topics, sentiment around your brand, or total volume changes of a conversation, or even effects on revenues, you can begin to draw a correlation about the real impact of your social communities. Measuring impact can be quite challenging and often requires advanced web analytics or social listening tools.

## Recommended Resources:

- **Hootsuite:** [Getting Started With Social Media Metrics](#)
- **Sprout Social:** [The most important social media metrics to track](#)
- **Hootsuite:** [How to Prove and Improve Social Media ROI](#)

## PAY TO PLAY

You may be following all the good practices outlined in this document and still not seeing success. That could be because your audience is not seeing your content. Unfortunately growing and reaching an organic audience on social media is becoming more difficult as social channel's algorithms limit your reach.

You may need to allocate a budget to get optimal results for your social media campaigns. Often, boosting a post costs a relatively small amount compared to other forms of advertising and can be quite effective. When spending money, it's a good idea to invest in a landing page that will help capture leads (ie, email addresses) from your audience so that you can reach out to them via email at a later time.

The good news is that you don't need a huge following to see results when paid media is in the mix. A Facebook page with a few fans and a \$500 budget could easily reach more people with one post than a page with a million followers and no budget.

## Recommended Resources:

- **Sprout Social:** [Social Media Advertising & Paid Social Guide](#)
- **Neil Patel:** [Pay to Play Social Media](#)
- **ShortStack:** [A Guide to GDPR Lead Generation: How Have Things Changed and What Should You Do?](#)

## THE KEY TO SOCIAL MEDIA SUCCESS

The key to social media success is taking a strategic and thoughtful approach to the type of social presence you want to build for your chapter, the types of conversations people in your community want to have with PMI, and how you will measure the success of your social efforts. Follow the guidelines outlined above and you'll be on your way to building a thriving and engaged social media community in your area.

## QUESTIONS

If you have questions about these guidelines or suggestions for updating this document, contact [chaptersupport@pmi.org](mailto:chaptersupport@pmi.org)