

## SOCIAL MEDIA TIPS

Mission statement: Identify measurable goals for the use and purpose of social media for your organization.

Cross-functional collaboration

- Involve all departments in the development of the program to allow for a comprehensive assessment.

Integrate with other policies and procedures

- Complaint process
- Training
- HR concerns
- IT / Cybersecurity
- Privacy Policy

Designate a staff person to maintain the program

Streamline roles and responsibilities to establish accountability

Define what type of content is acceptable and unacceptable

Implement an approval process

- New accounts
- Content/posting

Conduct regular employee training

Monitor and conduct periodic reviews

Implement repercussions for violating the policies and procedures

## TRACK AND MONITOR

- Track URLs for each platform
- Document the administrator of the account (branches)
- Contact email - preferably a corporate email address
- Identify platforms that originators have "claimed" and provided a summary / profile
- Regularly search for unauthorized accounts
- Regularly review authorized accounts for compliance
- Recommend corporate has access to business-related accounts

## SOCIAL MEDIA REQUIREMENTS

- Social Media accounts need to display a NMLS ID, physical address and web address
- Social Media advertisements are held to the same REG Z provisions as other forms of advertisements.
- Compliance with state and federal advertising requirements