

### **Disclaimer**

**Astonish Results is providing this sample agency social media policy solely as an example to assist agencies and brokers in creating a social web policy appropriate and customized for their particular firm. This example is not a substitute for agents and brokers independently evaluating any business, legal or other issues, and is not a recommendation that a particular course of action be adopted. In addition to this example, we strongly urge agencies to consider all of the issues contained in Astonish Results' report "Creating a Social Web Policy for Your Insurance Agency." If specific advice is required or desired, the services of your RFM should be requested.**

### **Social Media Policy**

#### **\_\_\_\_\_ Agency & Subsidiaries**

**OBJECTIVE:** The goal is to become a part of the industry conversation and promote web-based sharing of ideas and exchange of information. Social Media is to be used to convey information about company products and services, promote and raise awareness of AGENCY'S brand, search for potential new markets, communicate with employees and customers to brainstorm, issue or respond to breaking news or negative publicity, and discuss corporate, business-unit and department-specific activities and events.

AGENCY must ensure that use of these communications maintains our brand identity, integrity and reputation while minimizing actual or potential legal risks, whether used inside or outside the workplace. It is the right and duty of AGENCY to protect itself and its employees from unauthorized disclosure of information. AGENCY'S social media policy includes rules and guidelines for company-authorized and personal forms of social media.

#### **Corporate Rules and Guidelines**

The following apply to the use of all social media tools during company time.

- Employees must be authorized by AGENCY Corporate Marketing (NAME) or by your manager based on your job responsibilities to engage in work-time social media sites.
- Only AGENCY Corporate Marketing can prepare and modify content for AGENCY'S site located on [http://www.\\_\\_\\_\\_\\_](http://www._____).
- For all other social media sites, including AGENCY Intranet; content must be relevant, add value and meet the specified goals or purposes listed above. If uncertain with any information, material or conversation, discuss the content with your manager.
- All employees must identify themselves as employees of AGENCY when posting comments or responses.
- Any copyrighted information requires written reprint authorization before it can be posted.
- Business units and departments are responsible for ensuring all information complies with AGENCY'S written rules and guidelines. Business units and department heads are authorized to remove any content that does not meet the rules and guidelines of the policy or may be illegal or offensive. Removal of such information will be done without permission of the author or advance warning.
- AGENCY expects all guests to abide by all rules and guidelines of the company policy and holds the right to take same action as above in removing content.

#### **Personal Rules and Guidelines**

AGENCY respects the right of employees to use social media forums for self-publishing and self expression on personal time. However, unless specifically authorized by the company to do so as part of employee's position, employees are not permitted to use forms of social media or technology on the Internet during working hours or at any time on company computers or other company-supplied devices.

Employees are expected to follow the guidelines and policies set forth below to provide a clear line between you as the individual and you as the employee.

- You are personally responsible for your commentary. You can be held personally liable for commentary that is considered defamatory, obscene, proprietary or libelous by any offended party, not just AGENCY.
- You cannot use employer-owned equipment, including computers, company-licensed software or other electronic equipment, nor facilities or company time, to conduct personal communication.
- You cannot harass, threaten, discriminate or disparage against employees or anyone associated with or doing business with AGENCY.
- If you choose to identify yourself as an AGENCY employee, please understand that some readers may view you as a spokesperson for AGENCY.
- You cannot post the name, trademark or logo of the company or any company-privileged information, including copyrighted information or company-issued documents.
- You cannot post photographs of other employees, clients, vendors, suppliers or company products, nor can employees post photographs of persons engaged in AGENCY business or at company sponsored events.
- You are to contact Corporate Marketing (NAME) immediately if contacted by the media or press about any post that relates to AGENCY business.

### **Employer Monitoring**

Employees are cautioned that they should have no expectation of privacy while using the Internet. Your postings can be reviewed by anyone, including AGENCY.

AGENCY reserves the right to monitor comments or discussions about AGENCY, its employees and clients and the industry, including products and competitors, posted by anyone. AGENCY reserves the right to use content management tools to monitor, review or block content on sites that violate AGENCY rules and guidelines.

### **Reporting Violations**

AGENCY requests and strongly urges employees to report any violations or possible or perceived violations to their manager or Human Resources.

### **Discipline for Violations**

AGENCY investigates and responds to all reports of violations of the social media rules and guidelines and other related policies. Violation of this policy will result in disciplinary action up to and including immediate termination. AGENCY reserves the right to take legal action where necessary against employees who engage in prohibited or unlawful conduct.

### **Acknowledgment**

Employees are required to sign written acknowledgement that employees received, read, understood and agreed to comply with the company's social media rules and guidelines and any

other related policy, including electronic policies, discrimination and harassment, ethical conduct and confidentiality, renewals and trade secrets.

DATE

**ACKNOWLEDGEMENT AND UNDERSTANDING OF**  
**Agency & Subsidiaries**  
**Social Media Policy**

I have received my copy of AGENCY policy on social media. I know that I must read the policy so that I understand my rights and responsibilities as an employee of this company.

I also understand I may contact Human Resources if I need additional information about this or any other policy or procedure of AGENCY.

\_\_\_\_\_  
(Employee Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Print Name)

This page is to be submitted to Human Resources and will become a part of your employment file. Thank you.

\* RETURN THIS PAGE TO HUMAN RESOURCES IMMEDIATELY \*