



SOCIAL MEDIA HANDBOOK



Social Media:
a driver for
electricity
conservation

ACKNOWLEDGEMENTS

We would like to thank the LDC Tomorrow Fund for contributing to this project and believing it was worthwhile to explore how electric utilities in Ontario could benefit from social media to reinforce their activities and drive electricity conservation.

*We would also like to thank the EDA Communicators Council for their contribution of ideas and valuable suggestions for the handbook.
We acknowledge the contribution of all the utilities we interviewed who were forthcoming with advice for their fellow utilities.*

"This 'telephone' has too many shortcomings to be seriously considered as a means of communication."

- *Western Union internal memo, 1876*

"The wireless music box has no imaginable commercial value. Who would pay for a message sent to nobody in particular?"

- *an investor in response to David Sarnoff's push for radio, 1920*

"While theoretically and technically television may be feasible, commercially and financially it is an impossibility."

- *Lee De Forest, radio pioneer, 1926*

Source of the above quotes: "The Thank You Economy"
by Gary Vaynerchuk. 2011. HarperCollins, New York.

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INTRODUCTION

What you hold in your hands is the result of an 9-month research project conducted by IndEco Strategic Consulting Inc. (IndEco) and Niagara Peninsula Energy Inc. (NPEI).

Together, we have created this handbook to:

- Assist electric utilities in overcoming barriers to using social media,
- Provide a clear and simple stepwise approach to get started or enhance social media use, and
- Provide a set of recommendations for using social media as an additional marketing tool to drive participation in energy efficiency and demand management programs.

IndEco conducted background research on social media, as well as a series of interviews with electric utilities in Canada and the US (see Appendix B for a full list of interviewees). IndEco also assisted NPEI in designing its social media implementation and evaluation plan.

NPEI conducted a 4-month pilot of social media use (see case study, Appendix A) and IndEco evaluated its social media success.

Social media are defined as “communication tools that use the internet for social interaction.”

They are a burgeoning form of marketing and could contribute to the innovative marketing efforts utilities will need to meet or exceed their targets for reducing energy use and peak demand. Social networks and blogs have gained more and more recognition over the last few years. They are now ranked as the 4th most popular online activity and are used more frequently than personal email.¹

We chose to focus our discussion on the top 4 social media platforms used by electric utilities in Canada and the US (as evidenced during our interviews), as well as the most popular sites among users: Facebook, Twitter, YouTube and Blogger. We are aware that over time the platforms may change, but the basic principles of our strategic approach—from building the business case, and mitigating risks to engaging in open dialogue with customers—will remain the same.

We hope this handbook will be a useful resource for all electric utilities.

¹ Global Faces and Networked Places (2009), the Nielson Company (<http://www.web-strategist.com/blog/2009/01/11/a-collection-of-social-network-stats-for-2009/>. January 2009 - Accessed January 5, 2011.)

GETTING STARTED

If you're reading this, chances are you're convinced that engaging in social media is a good idea for your utility. But between today and posting your first message, there is a lot of work to do. Every business is different, but we've outlined the ten key steps an electric utility will likely need to take; each is discussed in detail below. Remember to stay positive, and have patience!

10 key steps to launch

1. ENLIST SOCIAL MEDIA CHAMPIONS
2. BUILD THE BUSINESS CASE
3. SET CLEAR GOALS
4. SELECT PLATFORMS
5. PREPARE AN IMPLEMENTATION AND EVALUATION PLAN
6. JOIN THE CONVERSATION
7. DRIVE THE CONVERSATION
8. BUILD-UP YOUR FANS/FOLLOWERS
9. MANAGE YOUR SOCIAL MEDIA PORTFOLIO
10. UPDATE YOUR SOCIAL MEDIA STRATEGY

1. Enlist social media champions

You need co-workers on your side. Ask around to find others who are familiar with using social media and/or who would be happy to work with you on this endeavour.

Ideally, you will get buy-in from co-workers, managers, and members of the Board of Directors. To obtain this support, you may consider organizing presentations across your organization to raise awareness of social media as an opportunity to connect with your customers. It is also important to involve key staff from all departments across your utility including Communications, Customer Service, Marketing, Information Technology, Human Resources, Energy Efficiency and Demand Management, Legal, etc.

Some of the people you talk to may not know a lot about social media, hence you should be prepared to answer questions such as "What are they?", "Why would they be useful for our utility?", and "What other businesses use them?" Remember to emphasize that social media are not intended to replace traditional marketing and communication activities. Rather, they are just another way to connect with your customers and the community.

2. Build the business case

One of the major challenges for an electric utility to start using social media is to get the necessary corporate buy-in. However, with careful preparation you can present a winning business case for why your utility should enter the social media sphere. Some may ask, "What are the risks of a utility using social media?" A more appropriate question you may want to address in your business case is: "What are the risks of a utility not using social media?"

As an electric utility, you are a unique type of business with specific challenges (e.g. meeting regulatory obligations for energy efficiency and demand management programs). Hence, you will need to "sell" the idea of using social media to your CEO/Board of Directors/Stakeholders by emphasizing how social media could be a useful tool to help you address those challenges and reinforce your activities. Before you schedule a meeting, we suggest you:

- **Document your list of social media champion(s) (see Step 1)**
- **Gather success stories (see "Success Stories" section)**
- **Demonstrate the reasons why your utility should use social media (see SWOT below)**
- **Prepare to respond to common arguments against social media (see Top 10 arguments against social media below)**
- **Develop a presentation and/or written report that includes an introduction to social media and why your company should use them.**

To shed light on the potential that social media could have, we analyzed the key strengths, weaknesses, opportunities and threats of social media for a utility such as yours. Each business is a bit different, so feel free to conduct a SWOT specific to your utility.

SWOT for electric utilities using social media:

Strengths

Social media platforms...

- Are easy-to-use and free (additional resources not required to get started)
- Are numerous, have different formats/features, hence can suit many different purposes (e.g. to share information, recruit new staff, etc.)
- Help to give a more human and also 'modern and innovative' image of the utility
- Allow for increased transparency of the utility to a variety of stakeholders
- Enhance engagement from utility employees
- Provide customers with another channel for direct access to utility staff
- Allow the utility to be a part of customers' conversations (i.e. reach out to customers in another way)
- Help to build relationships with customers
- Provide customers with real-time information (e.g. outage information/crisis management)
- Allow the utility to be creative, fun and convey useful information in a variety of formats (e.g. posts, tweets, videos, etc.)
- Allow messages to be sent to customers who want to receive information from the utility
- Give customers the chance to become an advocate for their utility

Weaknesses

Social media platforms...

- Are still a relatively new communication channel, with an uncertain future
- Do not reach all customers
- Provide the utility with increased exposure to customers, thus mistakes require immediate attention
- May require changes to the utility's IT department
- May require an updated corporate communications plan and/or policies
- Require constant (hourly/daily) attention
- May require utility staff training
- May require additional staff resources
- Have a return-on-investment (ROI) that is hard to show
- Are not easily measured or evaluated

Opportunities

Using social media would allow a utility...

- To leverage best practices of leading electric utilities that have social media success
- To reinforce the utility's brand image
- To be out there. Many other companies/ organizations are already interacting with your customers, why not you?
- To get press releases out quickly
- To target customer segments not reached through more traditional marketing channels before (e.g. younger generation)
- To solve customer issues more quickly: the utility can view customer comments/ complaints in real time
- To help drive uptake in (residential) energy efficiency programs by adding a new customer touch point
- To build on customers' feedback/comments/ ideas to improve activities/projects and enhance innovation

Threats

Using social media may mean...

- Higher exposure: potential for blemishes on corporate image
- Potential for customer response to be overwhelming for existing resources to manage
- Potential for a quick turnover of popular social media platforms
- Potential for additional risks related to privacy, ethics, hacking and site stability

Top 10 arguments against social media

Building your business case will require that you anticipate your Board of Directors' or senior executives' arguments against using social media and prepare sound responses to them. The following is a list of ten key arguments against social media, and responses you could use.²

Top 10 arguments

- There is no return on investment for social media
- Online discussions are meaningless
- We don't have the time and energy to manage social media
- Our customers do not use social media

Possible responses

- As with any other marketing tool, social media's direct financial impact will be hard to see/measure at first. However, they will have an immediate impact on our corporate image and brand recognition.
- Unlike traditional media (e.g. billboards or transit ads), we will be able to track how many customers view our content.
- Social media will help drive participation in energy efficiency programs and allow us to better understand who our customers are and what they want.
- Some but not all discussions are meaningless. We can use filters to only focus on what is of interest to us, hence what we want to monitor: search by keywords, mentions of our name, etc.
- We can use social media in a proactive way (e.g. by posting messages) and start a meaningful dialogue with our customers.
- Just like any other marketing tool, social media will require resources (time and staff). However, they will help us to [quote your goals here] and act as another touch point with our customers.
- It's possible to begin by using existing resources. Then, if the response from customers is significant, we may have to allocate additional resources.
- The use of social media is greater than the use of email.³
- You would be surprised by how many of our customers are using social media. (e.g. 50+ and 64+ segments have been the fastest growing segments for social media use between April 2009 and May 2010).⁴
- It may take a bit of time for our customers to find us, but many will be happy to connect with us online.

Top 10 arguments

- **Traditional media audiences remain bigger, hence we are not interested in social media**
- **Social media are not appropriate for our company**
- **There is a risk of damaging our corporate brand**
- **Upper management will not support social media**
- **So many tools are similar that we cannot tell where to invest our time**

Possible responses

- Social media are used to complement traditional media, not to replace them.
- Good marketing requires sending messages through a variety of channels (e.g. newspaper ads alone don't reach all of our customers).
- Traditional media outlets also use social media (e.g. CNN has started using Twitter and heavily promoting it on air).
- Remember, businesses once thought they did not need a website!
- Companies (public, private, NGOs, institutions, etc.) from a wide range of sectors are using social media and re-inventing themselves as innovative, customer-focused businesses.
- The top social media platforms are meant for the general public with no preference to any kind of brand, industry, or sector.
- Our customers are already talking about us online. If we can join the conversation, we will know what they're saying and be able to address their comments.
- You would be surprised to see how many negative comments come from inaccurate information. There is a risk of damaging our brand if we don't engage in conversations via social media. It is better to address negative comments than to ignore them!
- Social media will allow us to defend our corporate brand and manage our reputation.
- We can prepare a strong business case, including case studies and examples of successful use of social media by utilities.
- Better to get started than to be left behind!
- The four main platforms used by electric utilities in Canada and the US are Twitter, Facebook, Blogger and YouTube. These are also the most common among our customers. We can begin with one or two platforms, and expand slowly, where needed.

Continued on page 10

Top 10 arguments

- Social media are not secure or private

Possible responses

- We can draft a social media policy/guidelines that will clearly outline how to use social media and ensure that privacy is not violated.
- Privacy settings can be set on each social media platform. Social media hackers are not common, but our utility can manage those risks in the same manner that we manage the risks of our corporate emails being hacked.
- One of the benefits of social media is that it is an open platform for discussions. We don't want these conversations to be private. Responses to one customer's comment can be read by all fans/followers.
- If a customer starts sharing private account information, we can take it offline and engage with him/her through personal e-mail or direct message.



Be well prepared to address arguments against using social media.

TIP

² Marketing Shindig: 30 top objections to Social Media and how to respond – February 2010 (<http://www.marketingshindig.com/2010/02/04/how-to-respond-to-the-most-overused-objections-in-using-social-media/>)

³ Global Faces and Networked Places (2009), the Nielson Company <http://www.web-strategist.com/blog/2009/01/11/a-collection-of-social-network-stats-for-2009/>. January 2009 –

⁴ Pew research

3. Set clear goals

Now it's time for you to set goals. What do you want to get out of using social media? If your goals are clear, you will be able to monitor your progress and know that you are on-track. Your goals may include:

- Increase customer satisfaction and enhance your brand.
- Share information with customers: e.g. notify of power outages, inform on next community event you will be attending, etc.
- Encourage energy efficiency and conservation actions and behaviours through participation in your programs.
- Meet/exceed 2011–2014 regulatory targets for energy savings and peak demand reductions and receive associated incentives.

4. Select platforms

There are four main social media platforms being used by utilities in Canada and the US. Twitter is the most commonly used, followed by Facebook, YouTube and corporate blogs (usually Blogger). Flickr and LinkedIn were also mentioned during our interviews, but their use is less common among utilities. FourSquare was also referred to as a future possibility.

For the purposes of this handbook, we will focus on the four main platforms being used. Typical user types may vary from one platform to another. For example, Facebook users generally tend to be younger than those using Twitter. Also, each social media platform has different purposes and key features. There are synergistic effects if you choose to use more than one platform.



TIP

Two words: **CROSS MARKETING!** Use your traditional marketing channels to raise awareness and drive participation in your social media platforms.



CAUTION

“Social media have little value without an integrated approach that includes other forms of messaging and outreach.” [(Andre Francis – Pepco – (US))].

The following is a brief overview of the four main platforms:

A common language

Some terminology is common to these four social media platforms:

- **Content:** used to describe text, pictures, video and any other meaningful material that is on the Internet.
- **Conversation:** blogging, commenting or contributing to forums is the currency of social media platforms.
- **Direct message:** message sent to one customer if you don't want anyone else to see it (e.g. private account information, etc.), or it isn't relevant to anyone else.
- **Links:** highlighted text or images that, when clicked, jump you from one web page or item of content to another.
- **Post:** an item (i.e. message: text/image/link) on a social media platform.
- **Profiles:** the information that you provide about your utility when signing up for a social media platform. It may include your utility's logo and basic information.
- **Tags:** keywords attached to an item of content (e.g. post, bookmark, photo, video) so you and others can find them easily. Tags can usually be freely chosen.
- **To upload:** to transfer a file or other content from your computer to an Internet site.
- **URL:** Unique Resource Locator. Is the technical term for a web address.
- **Username:** a unique name for your utility on their site. The username you choose will be the name attached to your profile page, the comments you make and other places you interact on the site.



Primary uses

- Helps you connect and share with the people in your life
- Initially used as “friend networking,” now used by companies for “professional networking”

Key features

- Facebook page where you can add content (text and images) that can be viewed by the public (e.g. your customer and his/her network of friends)
- Your customers can become fans/friends and “like” or post comments on your posts
- Possibility to upload pictures, share links and videos
- Option to use Facebook e-mail to send private messages to your customers
- Alerts of your new content can be sent to your fans/customers
- Possibility to organize events such as contests

Facebook’s language:

There is a language that is specific to Facebook:

- **Friends:** Someone you add to your Facebook network.
- **Friend request:** Process of asking someone to become your friend.
- **Facebook fan page:** Special profile also known as “Facebook public profile” (versus personal profile) that aims to promote an organization, products, services, etc.
- **Facebook contest:** Events that you can organize to engage your customers.
- **Like/Dislike:** Option for people to give their opinion about your messages.
- **Poke friends:** “Tap” another person on Facebook to attract his/her attention.
- **Wall:** Your page where people can see what has been posted by you or others.



TIP

Use Facebook to post messages, photographs of events, videos and links to relevant information.



CAUTION

Although they are referred to as “friends,” you need to stay professional when interacting with your customers on Facebook.



Primary uses

- Micro-blogging: broadcast short messages (tweets – limited to just 140 characters) to your network or so called “followers” in real-time

Key features

- Twitter account where you can post messages (tweets) that can be viewed by your followers or by the public
- Followers can re-tweet or respond to your tweets
- Possibility to search for people/organizations /institutions by name or user name (e.g. energy companies, regulatory bodies, etc.)

Twitter's language

- **Follower:** On Twitter and other social media platforms, a follower is someone who subscribes to receive your updates. On Twitter, “following” someone means you will see their messages in your own personal timeline. Twitter lets you see all of the people you follow and also who is following you.
- **@reply:** Means a Twitter update (a tweet) that is directed to another user in reply to their update. An @reply will be saved in your “Replies” tab. Replies are sent either by clicking the ‘reply’ icon next to an update or typing @username message (e.g. @jerrysmith you can learn more about our new energy conservation programs at our community event in December).
- **Retweet (RT):** If you read a tweet that you think your customers/followers will also like, you can Retweet it to your followers. To do this, all you have to do is add RT to the start of the message: RT@ username where username is the Twitter name of the person you are retweeting, (e.g. RT@ jerrysmith thanks for the great conservation tips).
- **#hashtags:** They are used to add a subject keyword to a post (e.g. #outage). It makes it easier for your followers and non-followers to find updates on a specific subject.
- **Short URL:** A short alias to a long web address, often starting off with <http://tinyurl.com/>, <http://bit.ly/>, <http://snipr.com/>, <http://vieuurl.com/>. The benefit? When you have only 140 characters, the last thing you want is to make your message fit around a 50+ character URL.



TIP

Use re-tweets to give other users credit for their tweet. Chances are others may re-tweet your update too. A great way for you to gain more credibility and build relationships!



CAUTION

Get straight to the point. You only have 140 characters!



Primary uses

- Discover, store, watch, upload and share videos

Key features

- YouTube channel where you can watch, upload, or respond to videos. No need to be a fan/follower to view videos
- Option to embed relevant videos and present them on your website, if needed
- Ability to track how many views the videos receive
- Tag-and-search function

YouTube's language

- **Channel:** equivalent of a Facebook page for Facebook, a Twitter account for Twitter. This is where your utility can post videos it would like to share. See <http://www.youtube.com/user/BChydro> for an example of a utility's YouTube channel.
- **Embedding:** You may have seen the 'Embed' box in the description of the videos you watch. People can use this code and paste your video on their own web pages so that they can view it directly from there.
- **Favourites:** If you like a video, add it to your favourites list. It will be easier for you to find the next time you want to watch it.
- **Playlists:** Playlists are a good way of organizing videos. For example, someone could make a 'Conservation tips videos' playlist and fill it with videos they find on conservation.
- **Subscriber:** When someone subscribes to your channel, they get automatic updates every time you post a video.
- **Video responses:** You can post a video in response to another video. These video responses show up beneath the original video.



TIP

Videos are engaging and customers often like them. Ask around your organization: you might even have in-house expertise to create your own!



CAUTION

Signing up for YouTube means creating a Google Account that you can use to access YouTube, iGoogle, Picasa and many other Google services.



Primary uses

- Blog publishing service from Google for sharing text, photos and videos

Key features

- Website where you can write things on an ongoing basis
- Offers tools to help you design it
- Newest content (text + images) appears at the top, so visitors easily see what's new
- Visitors can comment on your post, link to your post from their own site, or email you
- Mobile blogspot to optimize the layout of your blog for those reading it on their phones
- Option to send text messages and e-mails directly to your blog

Blogger's language

- **Blogger profiles:** Where you can list your blogs, interests and more. It will help people with shared interests find you.
- **Blogger comments:** Feedback offered on your posts from anyone, anywhere. You can choose whether you want to allow comments on a post-by-post basis and you can delete comments that you don't like.



No character constraints here, though the web is more suited to concise pithy information, than long prose! Use your blog to provide information about your utility in a language that is accessible to your customers. You can also expand on subjects you may have mentioned on other platforms (e.g. Twitter).



Avoid allowing anonymous comments on your blog, and opt to approve comments before they are published.

5. Prepare an implementation and evaluation plan

Once you have a high-level strategy—clear goals and selected platforms (Sections 3 and 4) – you are ready to develop a plan outlining how you will make it happen. Your plan should include both an implementation and an evaluation component.

Develop an implementation plan

- **Project goals.** This section will detail what you want to achieve by using social media (See section 3).
- **Project content.** This section will outline the social media platforms you will use (See section 4) i.e. those that will be the most relevant to achieve your goals (programs you may want to promote, type of content you may want to post, contests you may want to run, etc.).
- **Marketing efforts.** This section will outline any forms of traditional marketing you will use to encourage customers, media, etc. to join you online.

Once you have chosen the platform(s) you want to start with, there are a variety of ways to officially launch it/them from press releases, local media, e-newsletter and bill inserts to community events. Choose the one(s) that will work best for your utility, and don't forget to include the platforms' icons on your website to drive people there.

- **Social media guidelines/policy.** You are in a risk averse industry and you likely have limited social media experience. Developing social media guidelines that will explain how to best engage on social media platforms is a must! All messages and responses should meet these guidelines.

Guidelines are unique to each utility, but commonly include:

- Always be positive,
- Do not take a defensive approach,
- Respond to all customer comments,
- Keep the message consistent,
- Encourage customers to use another channel (e.g. direct message, email, telephone) if they need to discuss private account information.

Based on an E Source 2011 survey,⁵ most utilities that engage in social media have an official policy. As utilities already rely on an overall communication policy, most of them add social media rules to their existing policy. Few utilities have a stand-alone social media policy, and even fewer utilities have no official policy at all.

- **Resource allocation.** This section will outline what staff members will be responsible for monitoring the platforms and posting new content. It is best to provide an estimate of daily, weekly, or monthly hours that will be devoted to these tasks, to better understand and plan for the human resources required. This section may also contain an outline of the staff training requirements.

The electric utilities using social media that we interviewed reported having between 0.1 to 3 full time equivalent (FTE) staff responsible for their social media platforms; most have existing resources who allocate part of their time to social media management and monitoring. Additional resources are likely to be required as your utility's social media activity increases.

Most interviewees also mentioned having no formal social media training, rather they leveraged their own social media experience and knowledge and then trained others, where needed.



TIP

Develop your social media guidelines collaboratively to ensure all potential risks are covered (See "Mitigating the risks" section for more details). Involve key staff in the discussion (e.g. staff responsible for managing the social media account(s); staff from corporate communication, legal, IT, etc. and any other staff that may want to come to the table).

⁵ E Source. 2011. State of utility social media – Results from a national utility survey (Stephanie Spalding, Research Manager at E Source) presented at EUCI (Denver) – Social media for utilities: strategy development and legal issues, July 25-26, 2011



Make sure to include an “access rights” section in your guidelines/policy including who can access the social media platforms, and who is entitled to post new content on behalf of your utility.

Develop an evaluation plan

Impact evaluation. Aims to quantitatively assess the changes that can be attributed to your utility’s use of social media platforms.

The impact evaluation plan must include the metrics/key performance indicators that you will track. These may include:

- Number of “likes”/“dislikes”, fans (Facebook),
- Number of tweets/re-tweets, followers (Twitter),
- Number of views (YouTube),
- Number of visits (all),
- Number of positive/negative/neutral comments (all),
- Number of customer interactions (all),
- Number of customers’ problems solved (all).

You can track metrics manually or opt for social media monitoring (SMM) tools. Some are free, while others require subscriptions. Some of the most popular SMM tools include:

- **HootSuite:** can be used to manage social media platforms, to efficiently track conversations, and measure campaign results (See section 9: “Manage your social media portfolio” for greater detail).
- **Google Analytics:** provides very detailed information on the use of web pages, including numbers of visitors, how they got to the particular page and where they went, technology they used, time spent on the page, etc.
- **Facebook Insights:** provides metrics that you can use to understand and analyze trends on your Facebook page (e.g. user growth and demographics, consumption of content, etc.) and improve it.
- **TweetDeck:** is a desktop application for Twitter and Facebook that allows you to monitor, manage and schedule your social media marketing activity.
- **Radian 6:** is a tool for real-time social media monitoring and analysis.
- **CoTweet:** is a web-based social media engagement, management and reporting solution that helps you engage, track and analyze conversations about your brand across Twitter and Facebook.

You may wish to submit the results of your evaluation in the form of a report to Senior Management weekly, bi-weekly, or monthly—at least in the beginning, while scepticism may be highest.

You may also want to conduct customer feedback surveys to further assess impact. They are an excellent way to find out how well your social media efforts are being received. You can opt for telephone, paper, or online—such as a Facebook survey.

Process evaluation. Aims to assess how well your social media plan has been implemented. It typically consists of interviews with key staff managing the platforms. Interview questions would probe into any internal communication problems, barriers to success, ideas for improvement, etc. Interviews are typically conducted at project milestones (e.g. after a 4-month pilot, after 1 year, etc.).



Monitoring and evaluation are integral parts of successful social media platform management. “We don’t have a choice on whether we do social media, the question is how well we do it.” (Erik Qualman – author of “Socialnomics: How social media transforms the way we live and do business”)



Don’t forget to re-evaluate the metrics you track as your plan progresses. You may need to change SMM tools as your metrics change.

6. Join the conversation

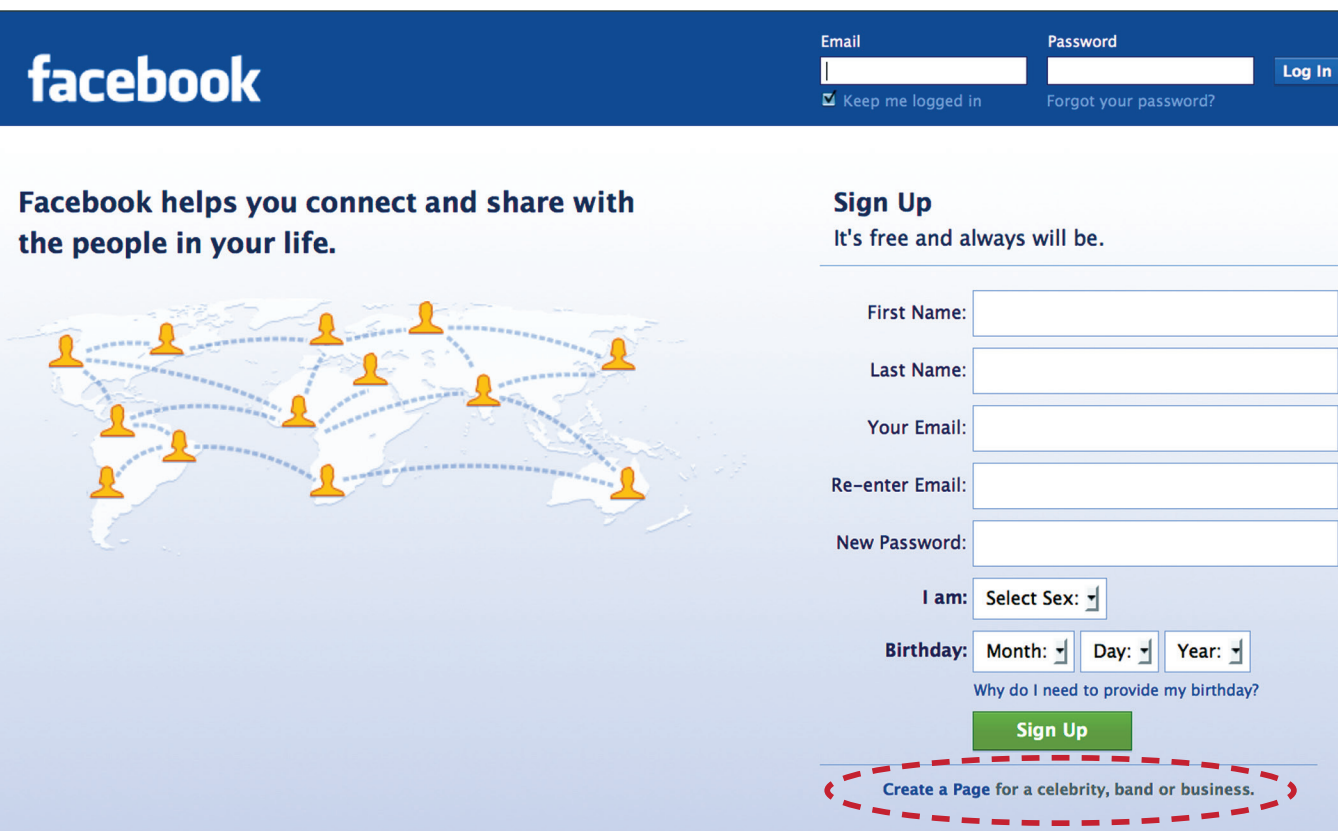
Once you have gone through all the previous steps, you are ready to start using social media.

We have outlined below an easy “how – to guide” to help you create an account and an icon on the top 4 social media platforms.

Create an account on the platforms you have selected



1. Go to www.facebook.com and click on “Create a page for a celebrity, band or business”

A screenshot of the Facebook homepage. At the top is the Facebook logo. To its right are input fields for "Email" and "Password", a "Log In" button, and links for "Keep me logged in" and "Forgot your password?". Below the logo is the text "Facebook helps you connect and share with the people in your life." followed by a world map with orange person icons connected by blue lines. To the right of the map is the "Sign Up" section, which includes the text "It's free and always will be." and a series of input fields: "First Name:", "Last Name:", "Your Email:", "Re-enter Email:", and "New Password:". Below these are dropdown menus for "I am:" (with "Select Sex:" selected) and "Birthday:" (with "Month:", "Day:", and "Year:" dropdowns). A link "Why do I need to provide my birthday?" is below the birthday section. A green "Sign Up" button is at the bottom of the sign-up section. Below the button is a red dashed oval containing the text "Create a Page for a celebrity, band or business." with arrows pointing left and right.


2. Click on Company, Organization, or Institution
3. Choose a category: Energy/utility
4. Fill in your information and click on the link emailed to you

Your page is now set up!

5. Complete your profile:
 - Select profile photo (e.g. your corporate logo)
 - Get fans (option to import contacts)
 - Enter basic information for people to know more about you. Enter your website address and a brief description of your utility.

6. Get started

ABC Hydro ▶ Get Started

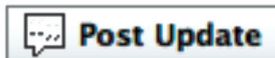
Energy/Utility ·  [Edit Info](#)

Welcome

1

Post status updates

Share your latest news.



2

Promote this Page on your website

Add a Facebook Like Box to your site and give people an easy way to discover and follow this Page.

[Add Like Box](#)

3

Set up your mobile phone Optional

[Send Mobile Email](#)

To upload photos or post status updates

[Send Text Messages](#)

To post status updates



7. Upload pictures and post updates on your “Wall”

After providing this information, here's what your 'Wall' looks like:

ABC Hydro

Energy/Utility · [Edit Info](#)



Wall

ABC Hydro · Everyone (Most Recent)

Share: [Status](#) [Photo](#) [Link](#) [Video](#) [Question](#)

Write something...

ABC Hydro This is your page Wall. Share stories, photos, post links, and upload videos for your fans to see.

RECENT ACTIVITY

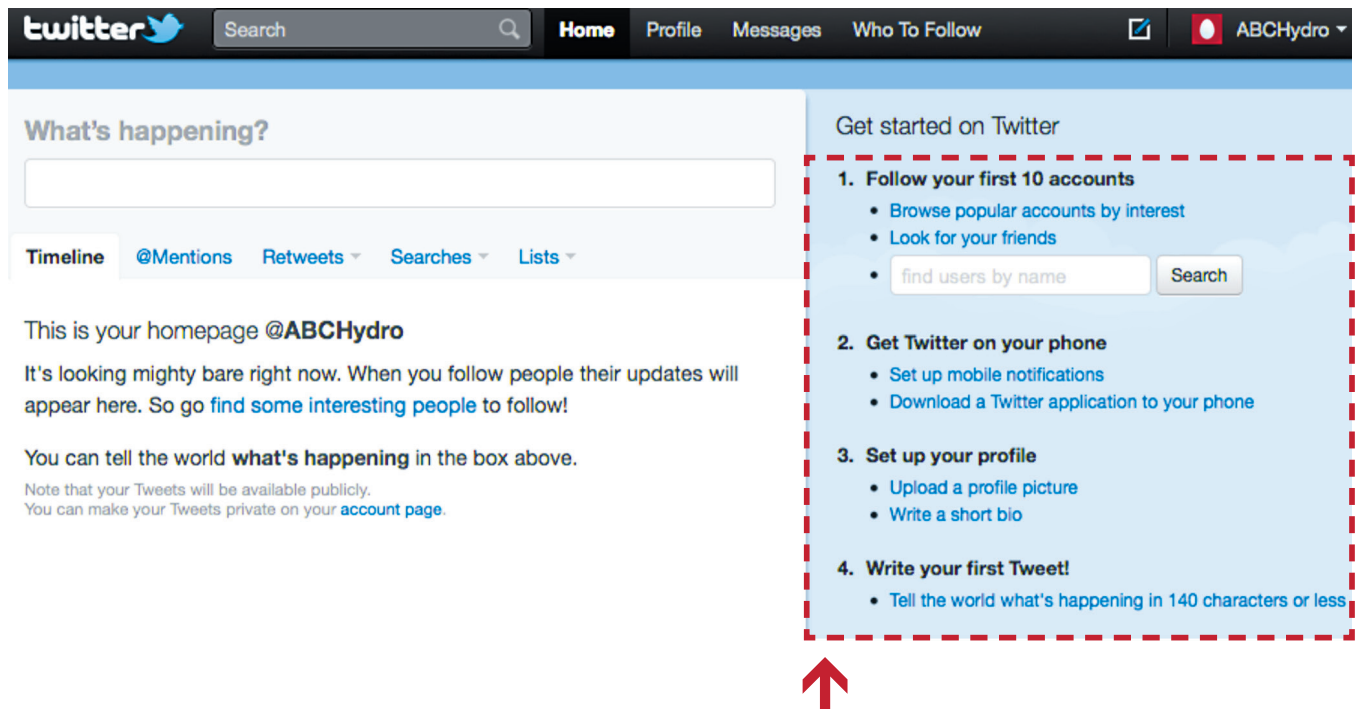
ABC Hydro joined Facebook. · [Like](#) · [Comment](#)



1. Go to www.twitter.com and enter your utility name, e-mail address and password

The image shows the Twitter sign-up page. On the left, the Twitter logo is at the top. Below it, the text "Follow your interests" is displayed in a large font, followed by a smaller line of text: "Instant updates from your friends, industry experts, favorite celebrities, and what's happening around the world." On the right side, there is a sign-in section with fields for "Username", "Password", and a "Sign in" button. Below these are checkboxes for "Remember me" and a link for "Forgot it?". Further down is a "New to Twitter? Join today!" section with three input fields for "Full name", "Email", and "Password", and a yellow "Sign up" button at the bottom right.

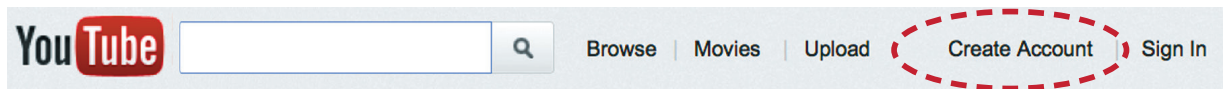
2. After clicking sign-up, you will be taken to the “create your account” page
Note that your Username will be “@what you entered”
3. Confirm your email address on the link emailed to you to access all of Twitter’s features
4. Start following others. You can search by interest. Try “energy,” “conservation,” another utility’s name, a municipality’s name, etc.



When you get to the following screen, follow the steps that show up on the right hand side of the page.



1. Go to www.youtube.com
2. Click on "Create an account"



3. You will be taken to the following page:

Create a new YouTube | Google account

Signing up for YouTube means creating a Google Account that you can use to access YouTube, iGoogle, Picasa and many other Google services.

If you already have a Google Account, you can [sign in here](#).

Required information for Google account

Your current email address:
e.g. myname@example.com. This will be used to sign-in to your account.

Choose a password: **Password strength:**
Minimum of 8 characters in length.

Re-enter password:

☒ Stay signed in

☒ Enable Web History [Learn More](#)

4. Enter your information and accept terms of service
5. Check your email and confirm your address
6. Once you have created a Google Account, you will be asked to set-up your YouTube username and channel
7. Start sharing your videos with your customers!



Video File Upload

Upload video or Record from webcam

Drag and drop videos anywhere on the page.

Videos can be...

- High Definition
- Up to 2 GB in size.
- Up to 15 minutes in length.
- [Increase your limit.](#)
- A wide variety of formats

Benefit from YouTube features



1. Go to www.blogger.com
2. Create a Google Account (e.g. gmail account) if you don't already have one, otherwise skip to step 3
3. Sign in: enter your gmail address, create password, enter display name, accept terms of service
4. You will be taken to the following dashboard page. Follow the instructions on the left hand side of your screen.

The screenshot shows the Blogger Dashboard. At the top right, there is a link "Try the updated Blogger interface" and a language dropdown menu set to "English (UK)". Below this is a green notification bar with a "New!" icon and text: "Do you link to Amazon in your blog posts? Our Amazon Associates integration makes linking easier and can even earn you some money! Details [here](#)." The main content area is divided into two sections. On the left, under the heading "ABC Hydro", there is a profile picture placeholder and a list of links: "View Profile", "Edit Profile", "Edit Photo", and "Edit Notifications". On the right, under the heading "Manage Blogs", there is a message: "You are not an author on any blogs yet, create one now to start posting!" with a large blue button that says "CREATE YOUR BLOG NOW". Below this button is a link: "Can't find your blog? See [My blog disappeared from my account!](#)".

Note: It is best to first edit your profile, add a picture and some information about your utility for customers to know more about you. Then you can click on "Create your blog now."

5. Name your blog: enter the title of your blog, and select your URL
6. Choose a "starter template"
7. Your blog has been created!


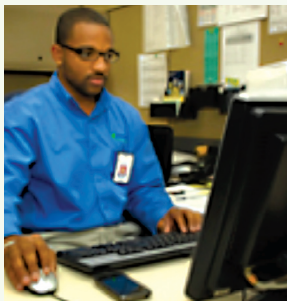

The screenshot shows a new Blogger blog page. The header features the title "Saving electricity with ABC Hydro" in a large, white, serif font against a blue sky background with dandelions. Below the title is a green grassy field. In the center, there is a green box with the text "No posts." Below this box is a red link labeled "Home". On the right side, there are two sections: "Followers" and "About Me". Below "About Me" is a small profile picture placeholder for "ABC Hydro" and a red link labeled "View my complete profile". At the bottom left, there is a subscription link: "Subscribe to: [Posts \(Atom\)](#)".

8. Now you can start posting and/or further customize how it looks. Use the “design” button on the upper right hand corner of your page.



Create your icon

When you create a new social media platform, you will need to select an icon. The major icon options and associated pros and cons are presented below.

Icon	Pros	Cons
<p>Mascot / Cartoon</p>  <p><i>E.g. The Conservation Owl for Hydro Ottawa</i></p>	<ul style="list-style-type: none"> ▪ Is friendly, un-intimidating 	<ul style="list-style-type: none"> ▪ Fans/followers may not be confident that it is their utility ▪ Might not be taken as seriously
<p>SM Rep's picture</p>  <p><i>E.g. Andre Francis for PEPCO</i></p>	<ul style="list-style-type: none"> ▪ Gives a personal touch; when customers reach out, they know who the SM representative is and may feel that they are dealing with a 'real' person, not an anonymous bureaucracy ▪ Helps engender trust 	<ul style="list-style-type: none"> ▪ Will require a transition if the staff person leaves
<p>Corporate logo</p> 	<ul style="list-style-type: none"> ▪ Fans/followers are confident that it is their utility they are talking with ▪ Builds brand recognition 	<ul style="list-style-type: none"> ▪ Might give the impression that there is no real human resource behind your SM platforms



TIP

Regardless of the icon you choose, you can always include the staff's initials at the end of each message to let people know who they are talking with.



CAUTION

Consistency is important. Once you select your icon, you shouldn't change it.

7. Drive the conversation

Like any conversation, what you say and how you say it matters. Consider:

- Frequently posting interesting, value-added content that will be useful for your customers (e.g. a tip to help them save energy),
- Using humour and a friendly, creative and conversational tone (slightly different from a typical corporate tone),
- Responding to customers' comments/messages in a timely manner.

Content of posts

The type of content you will want to share will depend on your utility, your service territory, and your social media goals. However, our research has found that regardless of the utility, customers are primarily interested in finding out:

- Ways to cut their energy bills,
- Power outage information, and
- New programs and services.

Other topics you may want to develop content around include:

- Safety tips,
- Emergencies,
- Energy efficiency programs,
- Demand response events,
- Upcoming community events,
- Relevant news,
- Time of use prices,
- Local success stories (e.g. green business stories).

To start, you can provide short messages on a few topics (with links to sections of your website, or other social media pages, for greater detail). Then, build on your customers' comments/feedback to tailor your content.



TIP

Think of information already shared through news releases and other traditional marketing channels that could be interesting to present and share with your customers in another format. Those are already approved messages (i.e. that are “ready to post,” without having to go through an approval process again)!



CAUTION

Using social media is NOT about pushing advertising about your energy efficiency programs but rather about finding the right balance between the different types of information you may want to share: valuable tips for customers to save money, power outages, etc.

Frequency of posts

Most of the utilities we interviewed reported posting new content on Facebook and Twitter daily (on weekdays), with 1–3 posts/day for Facebook and 1–5 and tweets/day. In addition, they usually post YouTube videos once every two weeks. The frequency of posts is increased during power outages, community events, etc.



TIP

Post messages to engage, and respond to your customers' comments to show you care!



CAUTION

Pick and choose what you want to post carefully. Resist the urge to over-post. You want to inform, not overwhelm your customers!

Keep the conversation going

There are many ways for you to engage your customers and create ongoing interaction:

- Ask questions and invite feedback. Customers' responses give you an opportunity for dialogue,
- Start conversations: e.g. "Tell us..." Customers will ask you more questions and you will get a chance to answer them,
- During a major weather event, make sure you are online, providing updates. This might be the best time for you to show your customers that you are there for them.



The frequency of posts will not necessarily be consistent. It may vary upon availability of new information, events, etc.



Avoid generic messages. They are boring and very easy to ignore!

8. Build up your fans/followers

Chances are that participation in your social media platforms will not explode over night. Growth in participation will probably be slow and steady. You need to be patient and consistently post interesting content (See section 7). Customers will become your fans/followers if they find that your messages are useful and interesting.

Based on our interviews with leading utilities in social media:

- Growth is generally organic and starts from following others, engaging in conversations, word of mouth, etc.
- It often takes about a year to build up a substantial number of fans/followers.
- It will be hard to say whether your numbers are low or high. Remember that who is following you and the quality of engagement may be more important than how many are following you.
- Numbers tend to boost after critical events (e.g. storm/power outage in your service territory, nuclear event in Japan, etc.). Make sure you are online addressing customers' comments/concerns at that time!

To help grow your fans/followers base faster, you can:

- Hold Facebook contests such as trivia question, and promote them via traditional media (See Appendix A).
- Get key influential people/organizations to follow you! Some of those include: the media, local politicians, municipalities, local celebrities, other electric utilities using Twitter, etc. Concurrently, follow key stakeholders and journalists to learn about emerging issues.
- Use hashtags and search for mentions of your utility on Twitter.

9. Manage your social media portfolio

If you are interested in a tool that helps you review statistics on your messages and pre-schedule posts (e.g. to be sent at a time when more of your fans/followers are online), you will want to consider using a dashboard.

There are a number of dashboards available, and one of the most common ones is HootSuite. It offers several management tools, including: ability to post to several social media platforms simultaneously (e.g. Facebook, Twitter), custom analytics to help you measure your social media success (e.g. report templates), aids for team working (e.g. delegating customer follow-up to another staff member), and message scheduling tools.



TIP

Take all your messages from your social media platforms and organize them into efficient streams. For more information, see: <http://blog.hootsuite.com/hoottip-how-to-add-new-streams-adjusting-in-hootsuite/#more-15550>



CAUTION

You can update all your platforms simultaneously with Hootsuite. However, remember that your target audience might be different from one platform to another. Make sure your heading/introduction is relevant to your particular audience.

10. Update your social media strategy

The successful use of social media is an iterative process. You need to be prepared, start with a plan, and update your plan to reflect the lessons learned as you progress.



TIP

Revisit your plan at least once a year, earlier when you are just starting out.



CAUTION

Do not forget to communicate internally: have a plan, follow it, adjust it and let staff know what you are doing.

MITIGATING THE RISKS

All activities carry risks. The use of social media presents risks too, however none of these risks are really new. They could occur whether or not you get started or enhance your use of social media. Avoiding social media is not the solution. Instead, identify potential risks and ways to mitigate them.

To get you started, we have prepared a list of key risks and mitigation strategies.

Key risks and risk mitigation strategies

Risk	Risk mitigation strategy
Site security and stability	<ul style="list-style-type: none"> Most utilities have developed several types of software protections and firewalls to avoid hacking and site stability issues, and guidelines for ensuring strong passwords. You need to make sure that these existing tools and processes will also protect your social media initiatives.
Ethics and privacy Customers share personal information about their utility account on your social media platform(s)	<ul style="list-style-type: none"> Address individual/private conversations offline by encouraging customers to use direct messaging and/or re-directing their inquiry to the customer care call centre.
Absence of control over social media platforms' policies and terms of use	<ul style="list-style-type: none"> Do not rush to create an account on any social media platforms. First make sure that you have a good understanding of the platform's privacy policies and terms of service.
Liability for employee conduct. e.g: <ul style="list-style-type: none"> Employee is representing your utility and talking on social media platforms on its behalf without proper authorization, Employee criticizes utility, Employee mis-represents utility. 	<ul style="list-style-type: none"> Revise your "Employee Code of Conduct" to cover employee use of social media.
Inconsistent messaging Posts/tweets are not aligned with your utility's vision, values and goals	<ul style="list-style-type: none"> Develop clear social media guidelines/policies including: message approval process, staff entitled to post messages, etc.
Negative comments from customers	<ul style="list-style-type: none"> You can decide to reply, ignore, or delete the message. Response protocols to negative messages should be included in your social media guidelines: e.g. obscene, irrelevant or libellous comments are deleted. Other negative comments are responded to calmly and sincerely.
Legal issues related to social media contests	<ul style="list-style-type: none"> Develop official rules for social media contests stating specific eligibility requirements and disclosing restrictions on receiving the prize. Review your social media platforms' contest policies to ensure you comply (e.g. on Facebook, a condition of entry can be for the entrant to first "like" the page).

Ways to handle negativity

Companies love talking about their social media success stories. However, it is also important to understand what things have gone wrong for them, how they handled the situations, and how you might learn from their experiences. Below are a few examples of utility social media issues and how they were resolved.

Social media issue	Solution adopted
Misinterpretation of utility's CEO speech by customers	<ul style="list-style-type: none">▪ Posted CEO's initial speech with a follow-up video on the corporate blog▪ Responded to every single mention of this story on Twitter Result: Successful clarification of the situation
Negative comments from radio personality during a utility's power outage	<ul style="list-style-type: none">▪ Posted messages on social media platforms▪ Responded to every single comment from customers Result: Opportunity for the utility to target, through social media, audiences that it would not have otherwise contacted
Contractor of utility used utility's Facebook account to promote his own services (versus what the utility can offer)	<ul style="list-style-type: none">▪ Deletion of the comment and e-mail to the contractor to explain how this violated the guidelines Result: Contractor apologized

GETTING RESULTS

Launching your social media campaign will require some work, but there are lessons you can learn from other utilities. When asked what they gained from using social media, and the advice they would offer to other utilities, the utilities we interviewed were forthcoming. Below are some anticipated outcomes, and key pillars to keep in mind.

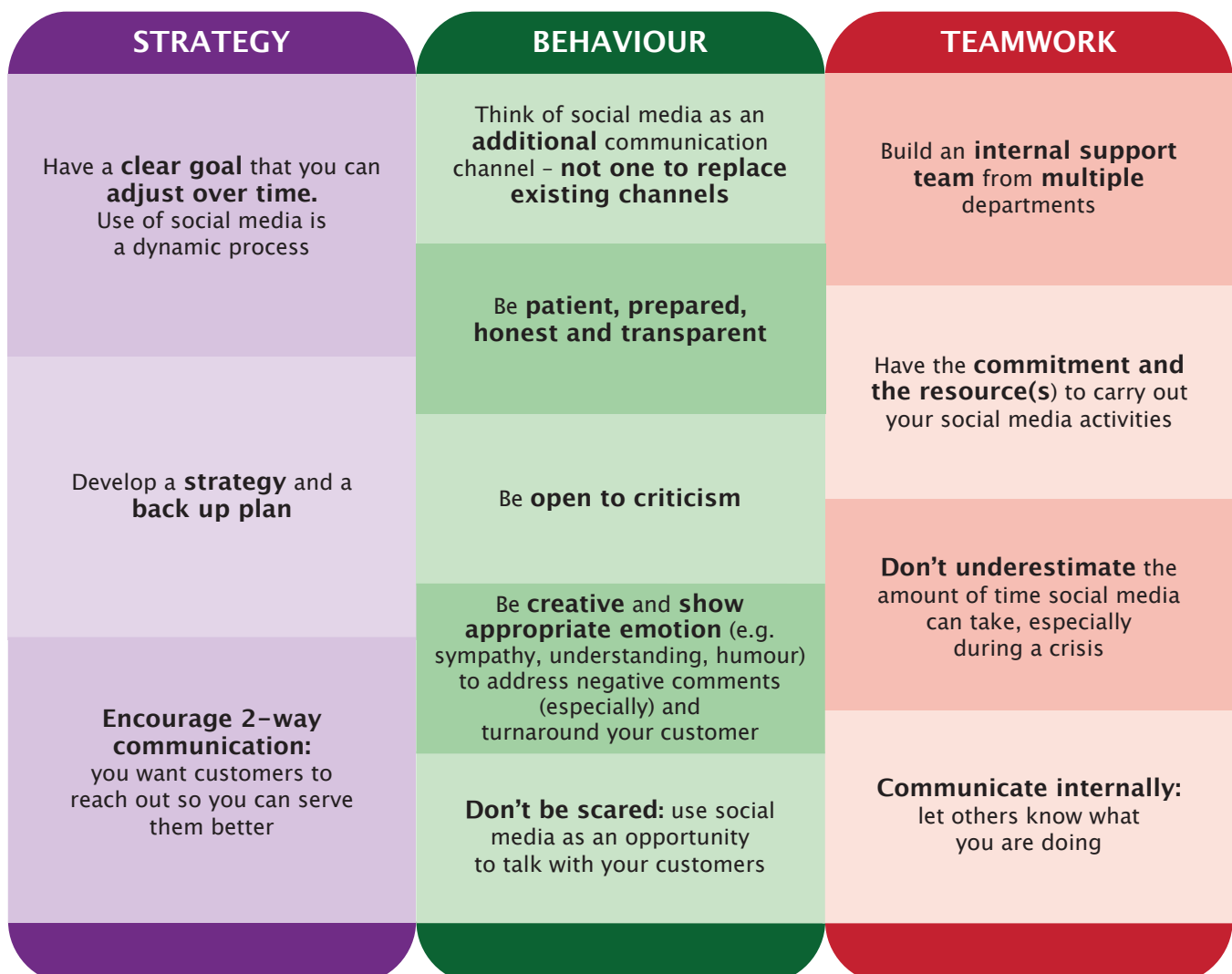
Anticipated outcomes

The utilities we interviewed reported that using social media has helped build their customer satisfaction, hence reinforce their brand image. Some of the results obtained include:

- Positive customer feedback,
- Increased utility recognition,
- Customers' gratefulness: happy to see their utility online (more human image), thankful for being kept up to date (especially during power outages), satisfied with a convenient way to get in touch with their utility,
- Increased customer's familiarity with energy efficiency and demand response programs,
- Industry attention: other utilities look to them for advice.

Keep In Mind (KIM) list

The three key pillars you will want to work on to successfully use your social media platform(s) are illustrated below:



ENGAGING CUSTOMERS

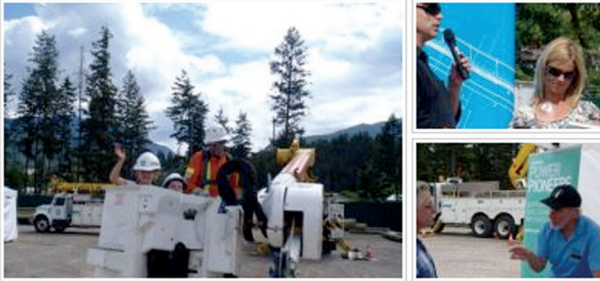
This section illustrates how some electric utilities have successfully engaged customers by using social media.



Background: BC Hydro provides energy solutions to customers in British Columbia. BC Hydro is on Twitter, Facebook, YouTube and Flickr.



BC Hydro added 4 new photos to the album [Community Open Houses Summer 2011](#).



Shared pictures
(e.g. community
events)

Like · Comment · June 20 at 8:22am ·

Ann Peters, Bert Mercer, David Forsayeth and 21 others like this.



Tonya Tait do you pick up old fridges and deepfreezer's
June 3 at 9:33am



BC Hydro Hi Tonya – we have our Fridge Buyback program where we'll pick up your spare working fridge, recycle it, and give you \$30! It's a great option to help reduce your energy consumption from operating a second fridge (please note that it's only available for fridges, not freezers). You can get all the details and eligibility requirements here: www.bchydro.com/fridge

If you're looking to get rid of an old freezer, recycling it might be a good option. The Recycling Council of BC has some great resources: <http://rcbc.bc.ca/>
June 3 at 10:34am

Helped customers
by referring to
existing energy
efficiency
programs



Sharlene Coulter I love bucket rides!!! You guys are so brave „ Thank You for maintaining our power , and thank you for going out in the middle of the night ,in storms and harsh situations to keep all us Residents fridges and freezers , from thawing , You all are very brave and I think of you all as heroes at times,, Three Cheers for the BCHydro LineMen Hoooooraw, Hoooo Raw,, Hooo Raw!!
June 3 at 12:31pm · 2

Customer's
thank you
(for info during
power outage)



Gordon Carr when is the next one
June 3 at 1:13pm

Raised
customer's
interest



BC Hydro Thanks Sharlene for the great feedback – we'll be sure to pass that along to our crews!

Gordon – we'll be in Terrace this Saturday, June 4 for the next open house, and there are more dates scheduled around the province this summer. You can check out all the details here: http://www.bchydro.com/news/community_events/outreach_open_houses.html
June 3 at 1:31pm



Nathaniel Hewitt ooh, so this is where our ridiculous hydro bills are going– bucket truck rides! good to know!
June 3 at 2:03pm · 3



Jasmin Laflamme Wow...Have you seen the rates in other parts of the world? Say... like Germany, Bulgaria, Peru??? Just to name a few...believe me, we're doing pretty good.
June 8 at 6:18pm · 2

Had customer
become its
advocate



Background: Enersource serves almost 200,000 residential and commercial customers across Mississauga. Enersource uses Twitter.

A few tweets that illustrate Enersource's community interaction:



EllisDon EllisDon

Thanks for the Support! RT [@enersourcenews](#): Congrats to [@EllisDon](#) for being recognized on the Maclean's Green 30 list. (May 9 issue)

10 May



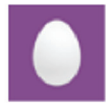
Bike4Betty Bike4Betty

Thanks! RT [@enersourcenews](#): We're looking forward to [@Bike4Betty](#) this weekend and helping raise money for a GREAT cause <http://bit.ly/k7xFfI>

27 May



Background: Hydro Ottawa is the third largest municipal electric utility in Ontario and delivers electricity to 300,000 residential and business customers in the city of Ottawa and the village of Casselman. Hydro Ottawa uses Twitter, Facebook and YouTube.



kedmison Kelvin Edmison

@hydroottawa @hydroottcares Can the person who updates the info on the outage phone line post tweets at the same time?

16 Jun



Customers want to be informed on Twitter



hydroottcares Hydro Ottawa Cares

@kedmison Thanks for great the suggestion! Plans are to automate outage tweets 24/7, but I'll pass the idea along to that team. ^ct

17 Jun



amy_yee Amy Yee

Hiya @hydroottcares - A brief outage in Centretown around 12:30 am - any idea why? Cheers and welcome to Twitter.

16 Jan 10



Customers are engaged and give info that is helpful for others



Background: Toronto Hydro is one of the largest municipal electric distribution utilities in Canada. It serves customers located in the Greater Toronto Area. Toronto Hydro uses Facebook, YouTube and Twitter.



Ivansoelen Lori Van Soelen

Wow, the power of twitter. thanks for getting our power back on @TorontoHydro. #asifthatwasreallytrue

22 Aug



TorontoHydro Toronto Hydro

@Ivansoelen Good to hear Lori! If you ever need to report a power outage you can also call 416-542-8000 ^HB

22 Aug



Brittzo Britt Garland

@TorontoHydro I appreciate you writing to me. Thank you for the offer, but I finally got through. :)

4 Aug



TorontoHydro Toronto Hydro

@Brittzo Our pleasure. Happy to hear you were able to get through. ^HB

4 Aug

Customers
use Twitter
to report a
power outage



Customers
appreciate
the dialogue



Background: Salt River Project (SRP) power and water is one of the largest utilities in Arizona. SRP uses Facebook, Twitter and YouTube and will soon be using Flickr.

YouTube

Browse | Movies

Fish herding down and dirty in the SRP canals

SRPConnect + Subscribe 108 videos ▾

A video player interface for a YouTube video. The video shows a group of about 15 workers in a concrete canal. They are wearing hard hats and waders, and are standing in the water, which appears to be murky. The workers are spread out along the length of the canal, which is bordered by concrete walls. In the background, there are palm trees and utility poles under a clear blue sky. The video player includes a progress bar at the bottom showing 0:02 / 1:12, a volume icon, a CC icon, a 360p resolution indicator, and a share icon. Below the video player, there are buttons for 'Like', 'Add to', 'Share', and a print icon. The video has 3,020 views, indicated by a bar chart icon.

0:02 / 1:12 CC 360p

Like + Add to ▾ Share

3,020

what is the strangest thing you guys have ever pulled out of the canals? Also what fish are typically fished there and are they safe to eat?

[crosmanchallenger1](#) 2 months ago

is it legal to fish in srp canals?

[lilbeaner602](#) 6 months ago

[@lilbeaner602](#) Yes, it is legal to fish in the canals with a valid Arizona state fishing license. However, the White Amur is classified as a catch and release only by the state. So the Amur are legal to catch, but must be returned to the canal. SRP works closely with Arizona Game and Fish to address the loss of White Amur to fishermen. Theft of white amur from the canals can be reported to Arizona Game and Fish, Operation Game Thief, at (800) 352-0700.

[SRPConnect](#) 2 months ago

ive noticed theres bass and catfish in the cannals and bluegill. when u net these species do u get rid of them or put them back into the cannal?

[Maddawgbaits](#) 9 months ago

[@Maddawgbaits](#) Those fish are also relocated, along with the white amur, to other canals that are not part of the dry-up.

[SRPConnect](#) 9 months ago

How many grocery carts do you pull out of the canals during the dry-ups?

[tonerduckpin](#) 1 year ago

[@tonerduckpin](#) We don't have scientific numbers, but the person in charge of our canal dry-up crews says several hundred grocery carts are pulled out each year.

[SRPConnect](#) 1 year ago

if i ever see a coi fish, im jumping in to get it.

[dodgedart74](#) 1 year ago

SRP, I didn't know you folks did this stuff, way-to go SRP!!!!, Great Video!!!!

[rwc2425](#) 2 years ago



People are
interested and
love videos!

APPENDIX A.

NPEI'S CASE STUDY

Who:

Niagara Peninsula Energy Inc. (NPEI) serves approximately 45,800 residential customers and 5,200 general service customers in the City of Niagara Falls, Town of Lincoln, Town of Pelham, and Township of West Lincoln.

What:

Launched a 4-month social media pilot as part of the research for this social media handbook.

When:

The pilot ran from July 15, 2011 to November 15, 2011.

Where:

NPEI launched both Facebook and Twitter accounts.

Why:

Primarily to increase participation in the Ontario Power Authority (OPA) Conservation and Demand Management (CDM) programs available to NPEI's residential and small commercial customers. Additionally, NPEI aimed to increase customer satisfaction, and enhance its corporate image.

How:

- Created a custom-built Facebook page that presented information on the programs, electricity conservation tips, and outage information. This page also hosted weekly contests with energy conservation measure prizes, and a grand prize draw for a new energy-efficient washer and dryer.
- Created a Twitter account that presented information similar to the content posted on Facebook. Twitter was mainly used to re-direct people to pages on NPEI's website.
- Made posts and tweets on Monday, Wednesday, and Friday at minimum, plus timely power outage updates. NPEI would reply to comments ASAP.
- Used the free dashboard tool HootSuite to schedule posts and tweets in advance.
- Promoted its two social media platforms through its traditional communication channels: newspaper advertisements, links on NPEI's website, a bill insert, a media release, and at community events.

Outcomes:

- 205 likes on Facebook.
- 64 Twitter followers.
- Fans and followers included a mix of customers and non-customers including media, the Ontario Energy Board (OEB), the public library, and local dignitaries.
- Vast majority of comments were positive and many were "thank you notes" to NPEI for providing helpful tips and information.
- Some comments were questions and concerns, and NPEI responded promptly with answers and explanations.
- No blatantly negative comments, and no security or privacy issues.

Key lessons learned:

- LDCs should establish a social media policy for their employees, contractors and Board of Directors to help mitigate risks.
- Building up your fans and followers takes time. A more appropriate time period for a pilot would be 1 year.
- A custom-built Facebook page is advantageous because it allows you to change the profile page to feature different programs, and this is the first page fans will see when arriving on your Facebook platform. The down side is that it is hard to get any technical support from Facebook if you were to need any (e.g. NPEI initially had a 1-week setback because of a delayed response from the Facebook technical support staff).
- You need to first get Facebook developer status¹ before launching a custom-built² Facebook page.
- If you run an online contest, allow customers without internet access to participate (i.e. promote the contest in other media), so you don't discriminate against any customers.
- You need 25 "likes" before you can get a static URL for Facebook (e.g. www.facebook.com/npeihydro), otherwise, it's a different URL every time you visit the page and you can't publish the URL on marketing materials. It's good to have 25 people lined-up to "like" your Facebook page immediately after your launch.
- Bill inserts can be very useful to encourage customers to join you online; NPEI noticed a large increase in the number of Facebook fans after their bill insert was sent out.
- It can be helpful for your social media representative³ to have a cell phone with internet access so he/she can be alerted of posts made on weekends, and give real time updates to customers (e.g. during a power outage situation). Also, when using a cell phone for updates, your social media representative is automatically recognized as the moderator (by Facebook/Twitter apps), hence he/she does not have to go through the log-in page.
- Contacting Facebook contest winners can be difficult. It's best to post/tweet the winner's name and ask the person to contact the utility at a particular email address.
- Over time, the use of social media may decrease the number of calls received by customer service representatives at your utility.
- By joining the conversation online and updating your social media platforms regularly, you may receive fewer calls from the media.

Next steps for NPEI:

- Incorporating social media as another communication tool in its overall communication strategy plan.
- Finalizing the utility's social media policy.
- Considering monthly, not weekly, Facebook contests.
- Continuing to track basic social media performance indicators (using Facebook analytics and manual tracking for Twitter).
- Continuing to use its corporate logo icon for branding consistency, but considering introducing a cartoon icon in the future.

¹ There is a straightforward process to get this status—apply via Facebook, receive a code via text message, and use the code to activate your developer status. Allow 2-3 days for this process.

² Refers to the creation of an additional web page as part of your Facebook site and requires developing an application (using HTML); see NPEI's Conservation page at www.facebook.com/npei for an example.

³ The one responsible for managing your social media platforms.

APPENDIX B.

SOCIAL MEDIA LEADERS INTERVIEWED

We conducted several interviews with electric utilities in order to design this handbook and ensure that its content is as relevant and applicable as possible for you.

We discussed with three major groups of utilities in Canada (in Ontario and outside of Ontario) and the US as illustrated below:

Social media users – To learn about their experience, key success factors, etc.:

- Enersource
- Hydro Ottawa
- Toronto Hydro
- BC Hydro
- American Electric Power (AEP)
- Memphis Light, Gas and Water (MLGW)
- Pepco
- Southern Company
- Salt River Project (SRP) power and water
- Xcel Energy

Non social media users – To identify the major barriers to social media use:

- EnWin Utilities
- Veridian
- Lakeland Power

Those in between (i.e. utilities preparing to use social media¹) – To understand how they are making it happen:

- Peterborough Utilities Group
- PowerStream
- Guelph Hydro

¹ At the time of our interview.

APPENDIX C.

SOURCES AND ADDITIONAL RESOURCES

Most of the content of this handbook draws on the experience of the electric utilities in Canada and the US that we interviewed.

Interviews were supported by many additional documents including reports/studies, surveys, research papers, articles, and presentations prepared by social media leaders.

Sources included:

- Burson – Masteller’s Fortune Global 100 social Media Check up Study
- Energy Law Journal – The Power of Social Media: Legal issues and best practices for utilities engaging social media (Carolyn Elefant – 2011)
- All about Social Media Monitoring Tools (Kiss Metrics, Oneforty)
- E Source State of Utility Social Media – Results from a national Utility Survey (Stephanie Spalding, Research Manager at e Source) presented at EUCI (Denver)– Social media for utilities: strategy development and legal issues, in July 25–26, 2011
- Using Non Traditional Media to Engage Customers (Andre Francis, Pepco’s social media representative – Denver Social Media Conference in July 2011)
- Social Media and Utilities: Driving the Conversation (Mike Stephens, Manager Corporate and Internet Communications, SRP – Denver Social Media Conference in July 2011)
- Social Media “Power” – Part 1: Legal issues for Utilities Engaging Social Media; Part 2: Best Practices for Utilities Engaging Social Media (Carolyn Elefant – Denver Social Media Conference in July 2011)
- The Wall Street Journal – Adult Use of Social Media Soars (Sarah E. Needleman – August 2011): http://blogs.wsj.com/in-charge/2011/08/30/adult-use-of-social-media-soars/?mod=wsj_share_linkedin
- The Economist – A world of connections (Martin Giles – January 28, 2010)
- Global Faces and Networked Places (2009), the Nielson Company (<http://www.web-strategist.com/blog/2009/01/11/a-collection-of-social-network-stats-for-2009/>. January 2009)
- Ten Common Objections to Social Media Adoption and How You Can Respond (Marshall Kirkpatrick – January 2008): http://www.readwriteweb.com/archives/ten_common_objections_to_social.php
- Marketing Shindig: 30 top objections to Social Media and How to respond – February 2010 (<http://www.marketingshindig.com/2010/02/04/how-to-respond-to-the-most-overused-objections-in-using-social-media/>)
- Is your target audience on Twitter, Facebook or LinkedIn? (Laura Aronsson and Bianca Male – February 2010): <http://www.businessinsider.com/is-your-target-audience-on-twitter-facebook-or-linkedin-2010-2>
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- www.YouTube.com
- www.blogger.com
- <http://www.thepicky.com/internet/what-is-twitter-features/>
- <http://kikolani.com/twitter-lingo-tips-twitter-facebook-users.html>
- <http://answers.yahoo.com/question/index?qid=20091226143157AA0TO4I>
- http://www.blogger.com/tour_end.g

We welcome your comments, suggestions,
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