

AFP Session # 144

Social Media Personality: Understanding your Social Media "Community" and taking charge of your "Social" life

November 9, 2011

8:30 a.m. to 9:30 a.m.

Room # 261

Created and Presented for AFP By:

- Jill Capicchioni, MBA, AAP, CUA, Channel Manager, FIS
- Laurel Egan Kenny, MBA, MCM, President, Turningpoint Communications
- Patricia Mullin, MBA, CCM, Vice President, Cambridge Trust Company

The screenshot shows the AFP Annual Conference website. At the top left, it says "AFP® Annual Conference" with the logo and "November 6-9, 2011 | Boston". To the right is a login section with "Email ID" and "Password" fields, a "LOGIN" button, and links for "Create an Account", "Help", and "Forgot Password". Below the header is a navigation bar with "Home", "Sessions", "Exhibits", "Maps", "MyPlan", and "Overview". A "Schedule" button is visible. On the right, there is a "Latest News" section with two articles: one from CitiGTS about managing payments and another from LaurelEK about social media personalities.

Fatal 8 Sure-FIRE ways to Get Fired for Social Media Antics

1. Complain openly about your employer, clients
H.S. Teacher Loses Job Over Facebook Posting. Cohasset Supervisor Resigns Over Remarks About School, Students, August 18, 2010, Boston.com
2. Improper use of WORK time, equipment, personnel
3. Post Incriminating Photos (of yourself, others, work)
4. Launch questionable Company Pages
5. Offensive changes to status, profile or network
6. Express disappointment and detail of job offer online
7. “Like” / join extremist groups / views
8. Blatant disregard for corporate policies:
Social Media, Sexual Harassment, Relationship, Discrimination

What You Will Learn

- Social media: Risk Vs. Reward
 - Enhance your life and career
 - Putting you at risk
- Social media vehicles: making or breaking your career
 - Multi-Social Media Success Story
 - What employees need to know
 - How business leaders can limit risk
- 11 Personality Types
 - What's Your type?
 - Understanding others'
 - Perceptions
 - Employer perceptions
- Takeaways:
 - Positioning yourself well: past, present, future

Social Media can enhance your life

- In a short period of time, you can obtain small bytes of information you may or may not care about
 - **Who** changed jobs?
 - **What** has Evan blogged about Social Media?
 - **When** is Patsy presenting?
 - **Where** is Johnny going for dinner tonight?
 - **Why** is Amy attending her class reunion?
 - **How** can I save a life with CPR?
- Risk Vs. Reward: *If you don't take part, you run the risk of being left out or becoming out of touch – or worse – being perceived as a dinosaur!*

About you:

- Experience with Social Media Channels: Facebook, LinkedIn, Twitter, Blogging, Google Communities?

– Facebook	1,2,3,4,5,6 years	Usage
– LinkedIn	1,2,3,4,5,6,7, original 5000	Usage
– Twitter	1,2,3,4,5	Usage

Social Media Vehicles

 Facebook “Book Up!”

 LinkedIn “Link Up!”

 Twitter

- Others:

- Texting



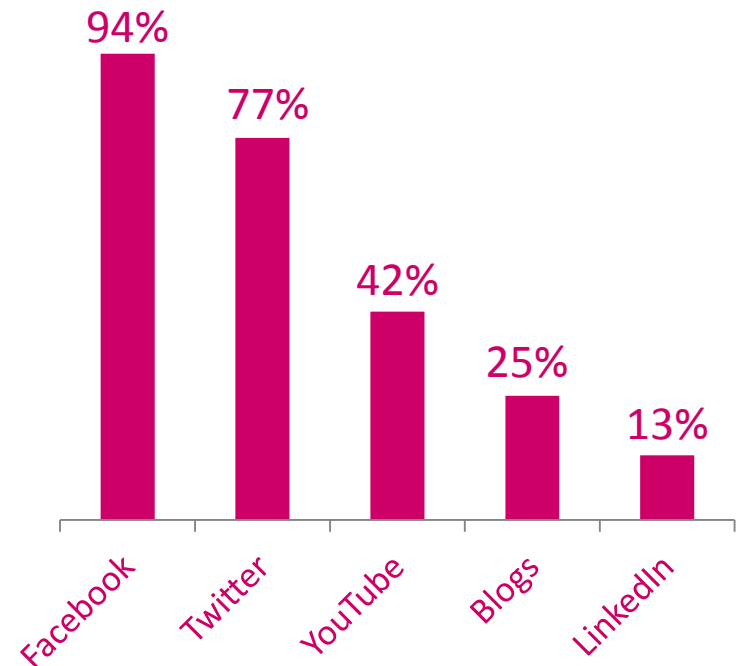
- Blogging



- YouTube

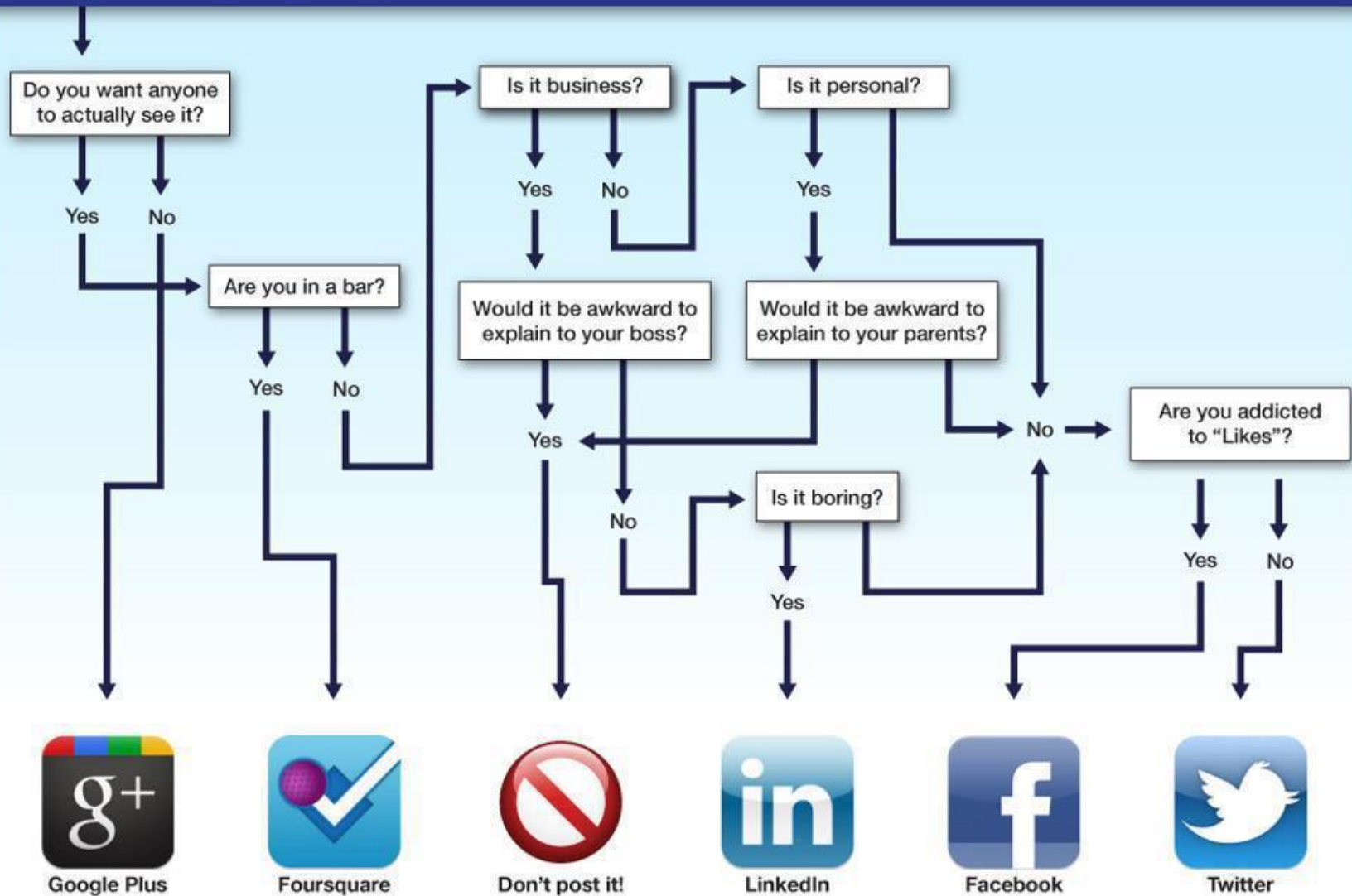
- Google/Yahoo Groups and Communities

Companies' Social Media Priorities



Source: Booz & Company/Buddy Media Campaigns to Capabilities Social Media & Marketing 2011 Survey results

Where should you post your status?



Social Media Empowers

- More than at any other time in history, people have the opportunity to reach a select audience of 10 or 800 million people with a few clicks, taps or scrolls.
 - **Aspiring artists:** authors, performers, thought leaders use social media as their chosen medium / delivery channel
 - **Traditional means of publication and production** are breaking down in favor of social media
 - **Stars are made!** Think Justin Bieber, Jackie Evancho
 - **Natural Disasters are worsened:** East Coast “Earthquake!”
 - **Information is shared in new ways**
 - Barack Obama, Mark Zuckerberg, Town Hall, Palo Alto, CA, FB 4/20/2011
 - Barack Obama, Putting America Back to Work, LinkedIn, 9/26/2011
 - **Political Change!**

Social Media can enhance your career

- Promote thought leadership on topics of expertise or interest
- Keep yourself and ideas top of mind for a select audience
 - Management
 - Clients
 - Prospective employer
- Get a new job
- Enhance your network
 - People
 - Companies
 - Industry organizations (Example)
- Stay abreast (in real time!)
 - News / Current events
 - Companies
 - people

Case Study – Aga Artka



- Self Employed Independent Interior Designer
- Frequently posts (daily) to LinkedIn on relevant topics
- Facebook – 2 Accounts (personal, business)
- Flickr – to post design work and travel photos
- Twitter – Helping her business grow
 - Twitter is an “Introduction Tool” that helps her develop **new** business relationships
 - 3 new clients from twitter directly over the past 3 years
 - Frequently participates in “Tweet Ups”
- Publishes a monthly newsletter of her tweets
 - “This month, I reveal the design inspiration and direction of my space in the WI Breast Cancer Showhouse. Coming to you via e-newsletter soon”

Social Media:

“Like” it or not, your personal and professional worlds are colliding

- Facebook: personal communication and informal information sharing with friends. Some retail businesses use it as a marketing medium
- LinkedIn: business/professional networking and information sharing
- Twitter: personal/professional, far less formal with 140 character updates with short shelf-life, designed for “real-time” feedback from followers you may or may not know
- YouTube: almost anything goes on YouTube. Personal, professional, instructional, but beware! Once it’s out there, you can’t get it back.

Regardless of your chosen medium, you must maintain dignity, respect, decorum because anyone, anywhere, anytime can get a hold of your posts, photos, tags, contact information, and private details of your life for uses beyond your control.

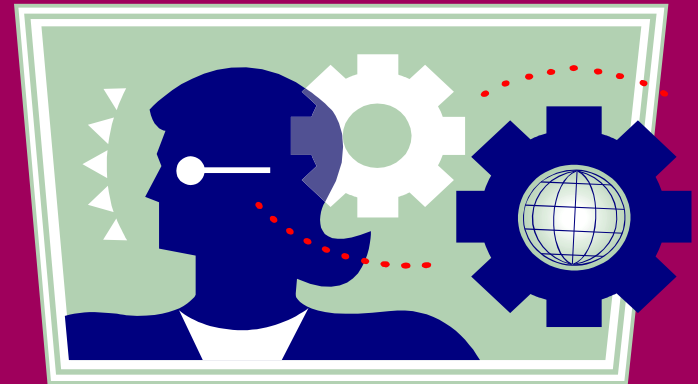
Social Media Personality Types: What's Yours?

“You only have one chance to make a good first impression”

Users are people with personalities

People have:

- Perceptions and inclinations
- Understanding and interests
- Habits and expectations
- Motivations and intentions
- Anticipation of the behavior and interests of others
- Self-motivated actions and an interest in their outcomes
- Relationships varying in meaning, purpose, nature
- Sense of being in time, together, with others



From: Social Media Personality Types, A view from Social Interaction Design, by Adrian Chan, www.gravity7.com

Personalities come through social media via communication and interactions

Communication

- Speaking, telling, narrating, recommending, asking, answering, commenting
- Listening, observing, empathizing, understanding, interest shown in others
- Performing, recording, posting, writing, expressing interests
- Mediating, sharing, forwarding and sending, linking, relationships.

Interaction

- Observing, seeing oneself being seen, and in being socially present.
- Isolating, joining, collaborating, competing, comparing, pursuing, as they are involved in social status and rank.
- Projecting, extending, attracting, enforcing, countering, gaining attention.

True personalities may or may not come through

From: Social Media Personality Types, A view from Social Interaction Design, by Adrian Chan, www.gravity7.com

Buddy:

Values Closest Relationships above all else

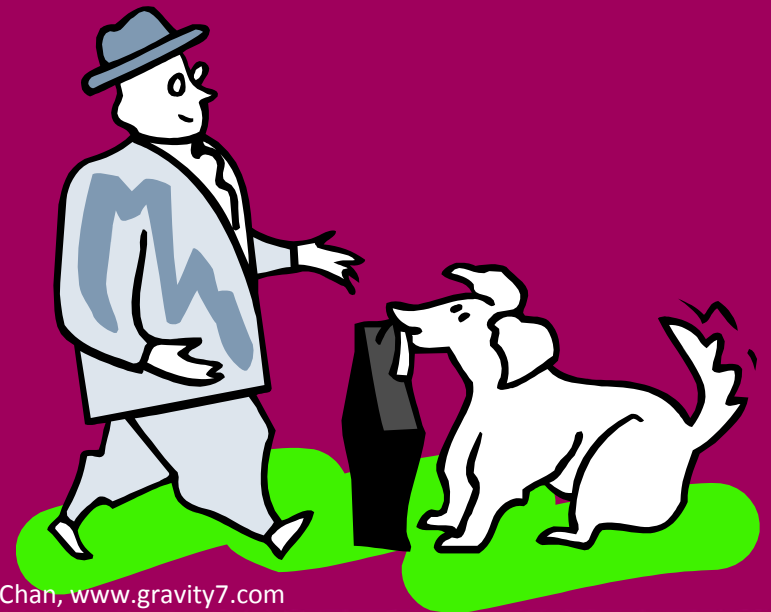
Personality

- It is all about the relationships
- Has fewer connections: all close friends/ family
- Not concerned with “networking” for career advancement

Interests & behavior

- Uses social media for connecting with friends/family

Employer Danger:
May be perceived
as antisocial or
behind the times.



From: Social Media Personality Types, A view from Social Interaction Design, by Adrian Chan, www.gravity7.com

Socializer: Socially inspired



Personality

- Stays informed about friends, events, and social news online
- Derives a sense of well-being from online interactions
- Passes time with online social pastimes rather than pursuing projects
 - Does not wait for invitations and notifications to log on.
- Feels like an integral member of his/her online community

Interests & behavior

- Initiates new friend contacts
- Creates friendly contributions and content
- Participates in social games and interactions
- Promotes emerging social conventions, rituals, ceremonies, and pastimes AND associated codes of conduct, etiquette, and subversions
- Shows/enjoys appreciation via ratings, votes, and symbols

Employer Danger:
May use work time for social media purposes. Wary of posting times and locations. Uploaded, tagged photos of work friends may lead to issues, contention.

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Emcee: Moderator, Facilitator

Personality

- Asks the questions that get people talking
- Keeps the conversation going at the dinner table/party

Interests & behavior

- Moderator of online communities
- Attracts others to discussion groups
- Interested in podcasting, RSS, blogs, video, twitter for communications



Employer Danger:
Lacks substance or
opinions. Co-
workers, boss may
offer popularity
reality check

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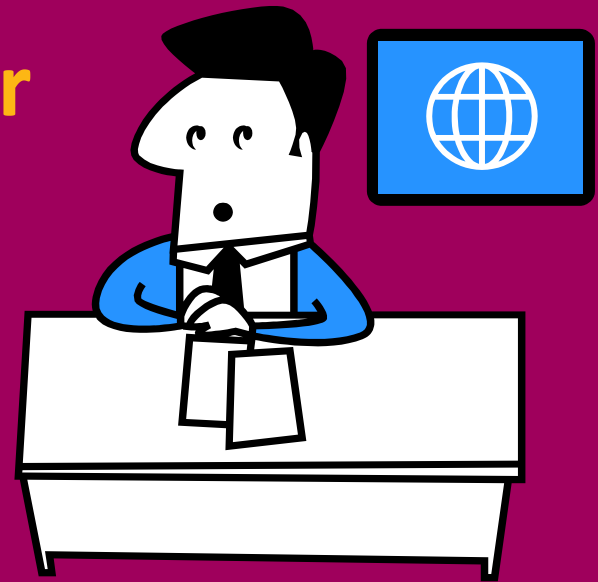
Pundit: News Anchor, Pusher, Backer

Personality

- Considers himself a leader.
- Promotes news, opinions, observations
- Believes he has a reputation, audience
- Not interested in making news himself
- Evaluates experts', critics' reputation, credibility, position

Interests & behavior

- Makes announcements about topics important to him and his audience
- Promotes Web as the fastest source of news and publishing
- Builds theme-based spaces online



Employer Danger:
Topics /experts endorsed
could incite controversy
at work.

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Harmonizer:

Mediating, Engaging, Sensitive



Personality

- Appreciates group membership and relationships
- Understands others' roles in group
- Cares about friends, is responsive to others' feelings

Interests & behavior

- Recognized for engaging group and keeping activity moving
- Has a sense of belonging and membership
- Contributes both personal and social content
- Checks in with friends and colleagues when they fade away.
- Circulates tokens, gifts, files, etc.

Employer Dangers:

Too many groups, and high level of engagement may be seen as waste of time and effort or, at the very least, unappreciated by co-workers, colleagues, boss.

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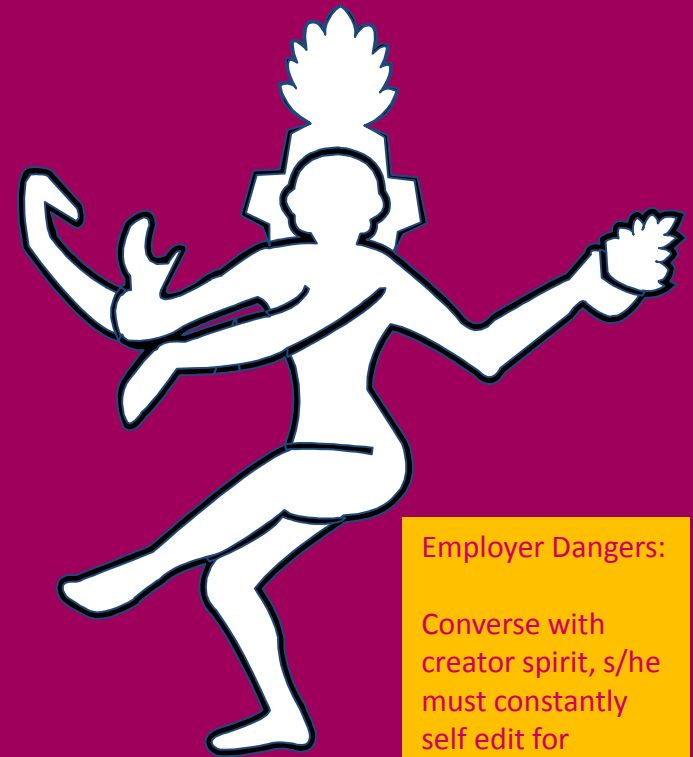
Creator: Author, Opinionated, Tracker

Personality

- Author of online content
- Has their own Blog to publish their opinions

Interests & behavior

- Tracks the number of followers, friends, connections as a sign of popularity



Employer Dangers:

Converse with creator spirit, s/he must constantly self edit for appropriateness, as all online content is searchable.

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Critic:

Feedback, Corrections



Personality

- Frequent provider of feedback on online content

Employer Dangers:

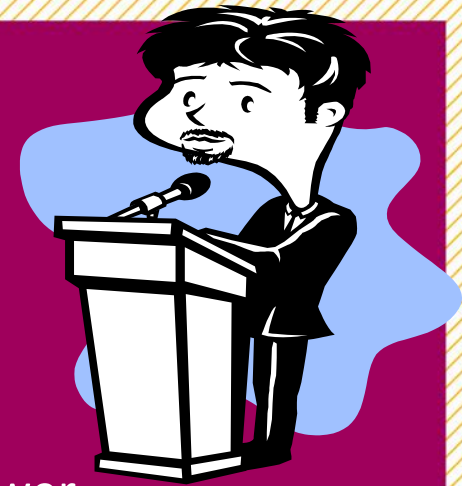
Must be selective about how, whom, when, where to edit .

Interests & behavior

- Corrects content
- Participates in online discussion groups

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Officiator: Entitled, Rule follower, enforcer



Personality

- Rules, convention, character, position, role enforcer/follower
- Uses rules to exercise authority
- Collaboration and cooperation are virtues
- Suspicious of insincere, inaccessible, private people
- Develops relationships by description rather than by gut feel

Interests & behavior

- Online game organizer/moderator: keeps players in line, on task, involved
- Underestimates repercussions of officiating
- Enjoys social games: tokens, points, leader boards, rank, events, etc.
- Sustains the reality of online games, and helps to make them relevant to those for whom participation may seem a distraction, waste of time

Employer Dangers:

Must be selective about how, whom, when, where to interject and enforce rules.
No gaming on work time.

From: Social Media Personality Types, A view from Social Interaction Design, by Adrian Chan, www.gravity7.com

Status Seeker: Show Off, Shallow



Personality

- Sense of self is built on what he or she has, owns
- Identifies through status and is sensitive to social significance
- Accumulates symbolic tokens of success and popularity
- Competes with others for social rank
- Believes that visible accomplishments are socially recognized and validated

Interests & behavior

- Rank is relative; Status is social; Position can be counted.
- Checks, supplements own stats. Compares to others.
- Accumulates friends, tokens, and other social status symbols.
- Avoids deep conversations

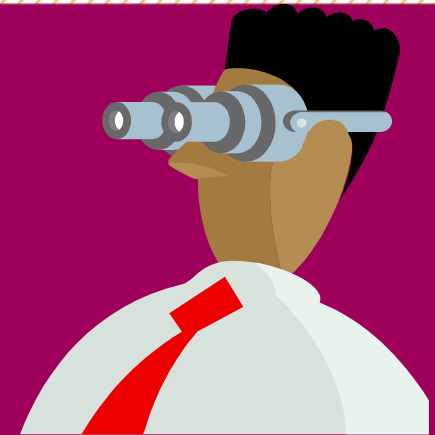
Employer Dangers:

Shallow, competitive with others for rank, popularity. Cause for concern when competition arises between co-workers.

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Lurker:

Passionate, passive aggressive



Personality

- Shy and sensitive to what and how people talk (about) online
- Allured by the medium and opportunities for anonymity
 - “Someone of LinkedIn” viewed your profile
- Logs in consistently to observe without drawing attention
 - Creates site visits, traffic, and page views by browsing
- Observant participant (follower) and resource to others

Employer Dangers:

Online activity is NOT anonymous within employer firewall. Unusual activity and long term log-ins raises suspicion.

Interests & behavior

- User of non-social, low-impact participation social media tools
- Naive about social media interactions
- Passionate about privacy, security, safety, authenticity online

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Rebel:

Heckling, Disruptive, Evil Genius

Personality

- A heckler
- Disrupts online chats and discussions for attention
- Disrupts game or application activity to push an agenda
- Targets specific content, groups or individual members
- Feels superior to others. Enjoys showing off or winning.

Interests & behavior

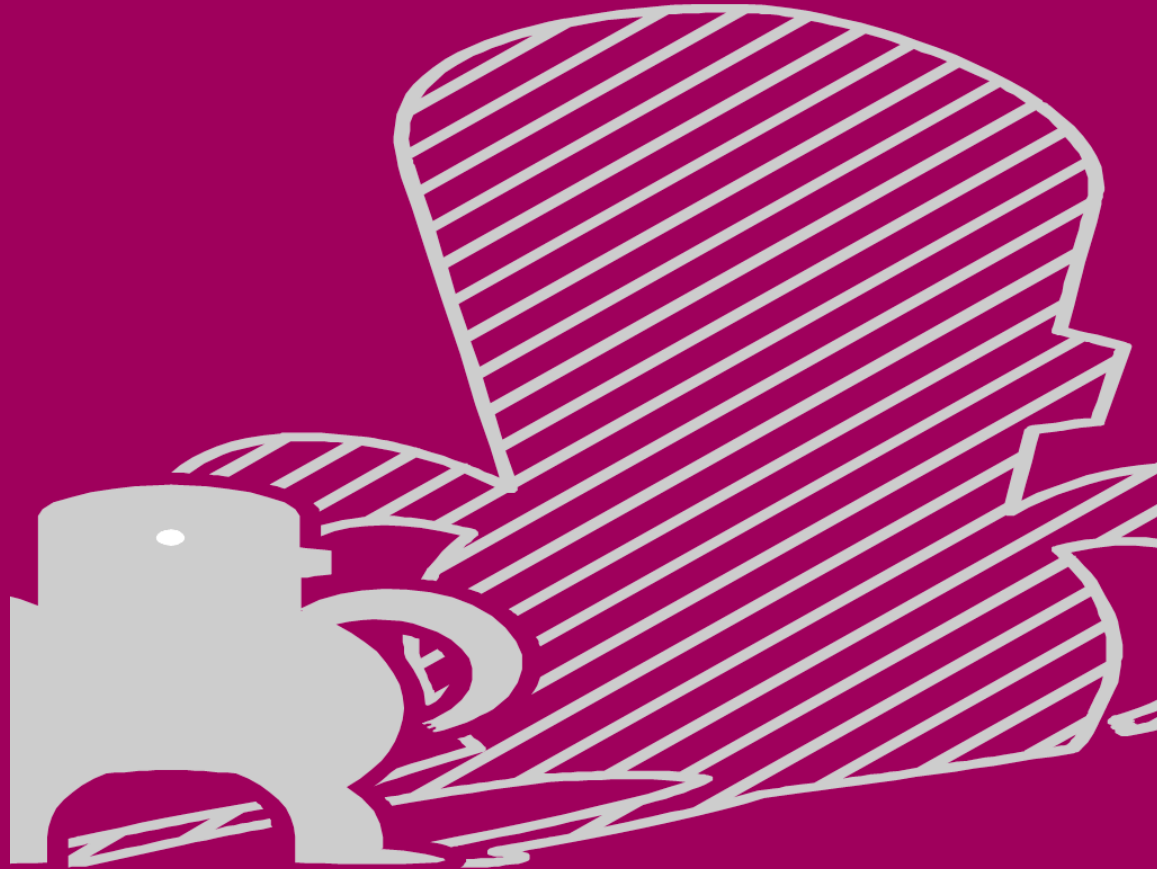
- Leader in new technology
- Developer of non-commercial social media applications, mashups
- In spoiling the fun of others, damages the medium's reputation
- Contributes positively to the open Web, while undermining commercial beneficiaries



Employer Dangers:

Rebel may purposefully disrupt employer systems, firewalls, processes. Targets individuals or groups for malevolence. Threat to corporate culture.

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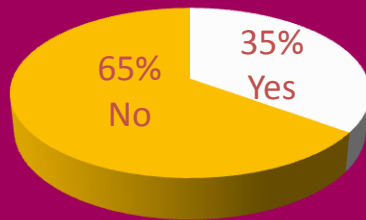
**Big Brother
is watching!**

Social Media Policies at Work govern your social life out of work

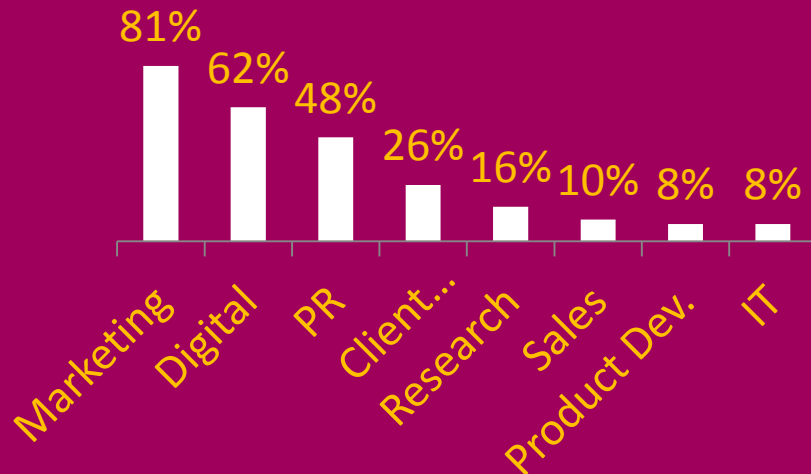
- More companies are requiring employees to sign a social media policy.
- www.socialmediagovernance.com for examples.
- Handout available upon request.
- Your employer is entitled to monitor everything you do, and may own or take action based on anything you do, online even on your personal PC or mobile device.
 - Violating Social Media Policies
 - Online activity may be grounds for dismissal (or add fuel to the fire) or criminal procedures

Who cares?

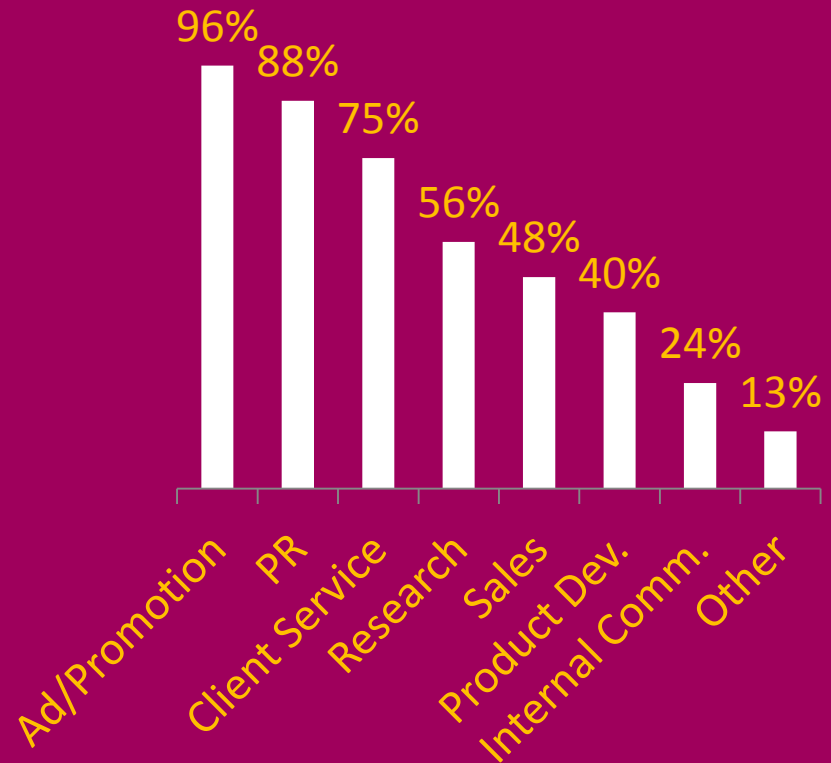
Companies with Senior Management-Led Social Media



Where Social Media Resides



Social Media Usage



Source: Booz & Company/Buddy Media Campaigns to Capabilities Social Media & Marketing 2011 Survey results

Proactively, Positively Influencing Your Constituents' Perception of Your Social Media Personality

Why Should YOU Care?

It is in your best interest to:

- Know yourself
- Know your social network
- Just like DISC or Myers Briggs personality profile tests, Social Media personality typing allows you to
 - Recognize how you are being perceived by others
 - Who you are dealing with
 - Influence other 'personalities'
- Recognize that your personality (personal or professional) is not necessarily what shows through online
- Social Media is not going away
 - Get in. A passive, non-existent, incomplete personality sends a bad message.
 - Be proactive. There are MANY positive things you can do.
 - Educate yourself. Be smart in your approach
- Capitalize on social media
 - It is easy
 - A lot of bang for the buck (FREE!)
 - Use your time wisely

How do you want to be perceived?

A picture is worth 1000 words.



Unwritten Rules

There are no formal rules to follow to ensure you are capitalizing on social media with each and every update, not hurting your reputation or how others perceive you.

- The best defense is a good offense. Be proactive, strategic
- Set realistic guidelines for yourself and commit to making social media work for – not against – you!

For some people, this new means of communications is scary, unfamiliar, but, you can learn to live comfortably with it if you follow the “rules.”

Free speech laws have not yet caught up with Social Media. But change is coming.

Social Media Exposes RU Putting Yourself at Risk?

- “Popularity”
 - 500+ Friends (LION Vs. Turtle). Where do you draw the line?
- Posting Photos, Updates, User Profiles, Privacy Settings
- Innocent Googling? Your reputation may proceed you:
 - Credit Score (usually accurate)
 - Health concerns (pregnancy, cancer, warts)
 - Buying Behaviors (Amazon)
- Your employer is entitled to monitor everything you do and may own or take action based on anything you do online/in social networks
 - Violating Social Media Policies
 - Online activity may be grounds for dismissal (or add fuel to the fire)
 - Who owns your network?
- Social Media Reality = Permanent, Transparent, Searchable, limitless

Far reaching

And so on . . . And so on . . . And so on . . .

- You can't be TOO careful
 - Interpretation / Perception is reality
 - Scantily clad or compromising positions
- Interfacing applications / cross posting
 - Save time, and effort, but beware
- Don't lose control of your content
 - Any one of your contacts may comment on (or like or share) your update, making it visible to all of their contacts, and so on and so on

Common Facebook Features:

Protecting you OR putting you at risk?

Profile Picture: Stick to professional or cross-culturally acceptable photos

- You never know where these photos will “pop” up!

Photo tagging: Untag unflattering, questionable photos

- Never: Post or pose for precarious photos
- Never: Use bulk photo posting applications

Commenting: Assume your boss is reading everything you write

- Never: comment on a post that you don’t want **your** boss to see
 - Click on upper left hand corner of update to block updates from offending person
- Never: comment on anything out of anger or bad feelings

“Likes”: Be selective. Your “Likes” become part of your User Profile

Games: Farms, Gardens, polls about people. Just Don’t. You know why!

Share: Be selective. Friends don’t like extremist views, over or re-posting

Friends: Only befriend people you know and **trust**.

Common LinkedIn Features:

Protecting you OR putting you at risk?

- **Connections:** Be mindful of what your numbers say about you.
- **Summary:** Quality not quantity. Use action words.
- **Honors and Awards:** Keep these current and relevant.
 - Keep your 1993 4-H trophy home!
- **Contact Settings:** ‘Job opportunities.’ Your boss WILL find out.
- **Recommendations:** Don’t be reciprocal. Discard old stuff.
- **Updates / Events:** Update your contacts with speaking engagements, industry events
 - Never: Disclose dates you’ll be away
- **Groups:** Assess for activity levels, usefulness, membership.
 - Group members can ask to join your network
- **Q&A:** Be selective. Seek “Best Answer” Status posted to your profile
 - Never: Promote your (or a friend’s) company. Answer with Best Practices
- **Polls:** Be selective. Be mindful that your participation will be posted to your profile

Common Twitter Features:

Protecting you OR putting you at Risk?

- **Always:**
 - Make every tweet worth reading
 - Tweet regularly: 2 times a day (being mindful of audience)
 - Check your profile settings to ensure privacy settings work
 - Selectively connect with new followers
 - Market Yourself accordingly
 - Promote yourself by including a link to follow you on twitter from your Blog, Website, Facebook, LinkedIn, email signature
- **Never:**
 - Retweet spam or advertising (# marks)
 - Frequently Tweet previous or old tweets
 - Tweet off-topic, off-color content, this can drive away your followers
 - YELL –UPPERCASE!!!!!!
 - Retweet bad news. Bad news travels fast.

Permanently Improve your “Social” Life

Social media allows for casual exchanges, but don't conduct yourself casually.

- Have a social media strategy for yourself
- Become a Thought Leader
 - Content is key
 - Be proactive. Be the expert.
 - Make your point, but do it concisely
 - Be selective about what you say, and to whom
- Decide upon and target your audience
 - Know your audience (every one!)
 - **Their** perception is **Your** reality. Don't leave this to chance.
- Select your medium
- Recognize the vastness of the medium's potential:
 - Permanent, searchable, traceable, limitless, forever (“Way back machine” www.archive.com)
- If damage has been done, hire Reputation.com to help clean up your act.
- Be proactive: set up Google alerts on your name, hire help.

Questions / Comments

Takeaways

Social Media Personality Goals

'Dress' for the Job You Want!

- What is your personality type?
 - What would your Friends say about you?
 - Your Family?
 - Your Employer? Your boss? Your colleagues?
- What are your short- and long-term career goals?
- Does your current social media personality reflect those career goals?
- What are the employer-perceived positive characteristics of your social media personality?
- What are the potential employer-perceived negative characteristics of that personality?
- How can you play up the positives and eliminate the negatives about your personality online?
- What steps will you take in the next week, month, year to improve your social media persona?

	This Week	This Month	This Year
- Who are the people in your life who can help you enhance your persona so you can meet your goals?
- How will you measure success?

Social Media Personality

Protect your Reputation

- Get in on the action. A passive, non-existent, or incomplete personality sends a bad message
- Create and follow hold yourself accountable to a social media strategy. Do NOT:
 - Post anything in exuberance, arrogance, anger, sadness, or with other extreme feelings
 - Post (or comment on / “like”) anything you would not want your boss or colleagues to read
 - Post, text or email during or after a night out.
- Treat others as you want to be treated your online. Just because “Free Speech” Laws have not caught up with Social Media, let your conscience be your guide.
- While social media allows for casual exchanges, never conduct yourself casually.
- Use social media for the many positives it allows, for example: Become a Thought Leader/expert
- Decide upon and target your audience where and how they like to be communicated to.
- Know your audience – everyone! **Their** perception is **Your** reputation. Don’t risk it.
- Recognize the vastness of the media’s potential: Permanent, searchable, limitless, forever!
- Be proactive: set up Google alerts on your name, and/or hire help.
- If damage has been done, hire a firm to help clean up your act.

Jill Capicchioni, MBA, AAP, CUA

Jill Capicchioni has over 15 years' experience in the Banking & Cash Management arena. Ms. Capicchioni has held numerous positions in cash management including ACH Operations, Product Support, Implementation, Sales and Product Management and has spent time working for both Banks and Vendors including the former National Bank of Detroit and NationsBank (Bank of America).

Jill is currently the Small Business Channel Manager and Product Manager at FIS, and is responsible for several of FIS's Account Recon & Positive Pay products and the development of products targeted to small businesses. Jill is a frequent speaker and panelist at banking and treasury management events across the country, and has previously spoken at the NACHA Payments Conference, Windy City Summit, and Treasury Management of New England conferences.

Ms. Capicchioni holds a BA from Eastern Michigan University in Urban Planning and has an MBA from Brenau University. Additionally, Ms. Capicchioni holds the AAP (Accredited ACH Professional) designation from NACHA (National Automated Clearing House Association) and a CUA (Certified Usability Analyst) designation from Human Factors International.

Jill can be reached at Jill.Capicchioni@fisglobal.com or 414-357-3083 (office) or 414-331-3873 (mobile)

Laurel Egan Kenny, MBA, MCM

Laurel Egan Kenny, MBA, MCM, is founder, owner and president of **Turningpoint Communications**, a marketing communications and training firm focused exclusively on promoting the thought leadership and best practices of its treasury management focused clients — in communications, at strategic events, in the media and in the communities they serve. Among her clients are 5 of the 10 largest financial services institutions in the United States.

Before founding Turningpoint Communications, Laurel spent 15 years building and leading marketing teams for treasury, wealth management and foreign exchange divisions at two of the largest, Fortune 100 financial services firms, directly aligned with executive, business development and relationship managers, from whom she learned the best practices, strategy, and the trusted advisor approach she brings to bear for her clients today.

In addition to running her business, Laurel presents nationally on a variety of strategic and industry topics and serves as Treasurer and Communications and Membership Chair of the Treasury Management Association of New England (TMANE), Advisor to the Association of Financial Professionals (AFP) and President of the Marshfield Massachusetts Chamber of Commerce. Laurel holds an M.B.A., an M.S. in Communications Management, and a B.A. in English and Communications, all from Simmons College, in Boston.

Laurel can be reached at: laurel@turningpointcommunications.com, 781-834-3308 (office), 339-793-3485 (mobile)

Patricia Mullin, CCM, MBA

Patricia Jones Mullin, CCM, MBA, Vice President, Manager Cash Management, Cambridge Trust Company, Cambridge, MA.

Ms. Mullin has an extensive career in banking, as a recognized leader in senior management sales and relationship management roles for well-known treasury management organizations, such as: First Chicago (Chicago, IL), State Street Corporation (Boston, MA), Sovereign Bancorp (Boston, MA) and Cambridge Trust Company (Cambridge, MA). She currently oversees the cash management business line at Cambridge Trust Company.

A permanent CCM, she has a Bachelor of Business Administration from Saint Mary's College, Notre Dame, IN, and an MBA (Finance) from Roosevelt University, Chicago, IL. Ms. Mullin is Past President and Current Board member for TMANE and is a thought leader at national and regional treasury conferences – including AFP, NACHA, NEACH, TMANY and TMANE and has been published in key industry periodicals, including AFP Exchange, on contemporary treasury management topics.

Patsy can be reached at: patricia.mullin@cambridgetrust.com, www.cambridgetrust.com 617-441-1408 (office)