

SOCIAL MEDIA HANDBOOK



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SOCIAL MEDIA CONTACTS

If you are a CFA Society looking for guidance, contact your society relations representative (SRR) or:

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If you or your firm are subject to compliance regulations, consult your firm's marketing or compliance department, or your national regulator for guidance on social media.

Examples:

- [Advertising financial products and advice services: good practices guidance](#) (Australia)
- [Investment Adviser Use of Social Media](#) (US)
- [Guidance on Social Networking Websites and Business Communications](#) (US)
- [Guidance on Blogs and Social Networking Web Sites](#) (US)
- [Handbook](#) (UK)

Disclaimer: This handbook provides information for individuals and CFA societies who wish to better understand how to use social media. The contents of this handbook do not constitute advice for organizations engaged in the sale of regulated securities, or the provision of investment guidance. Individuals seeking to use social media on behalf of a regulated firm must seek guidance on approved activities from the firm's marketing or compliance department, or appropriate national or territorial regulator.

WHY SOCIAL MEDIA?

- Engage with your audience on the platforms where they spend time
- Build greater awareness of your brand and what it stands for
- Share news, insights, and information
- Find advocates and encourage them to help spread your messages

WHO SHOULD MANAGE SOCIAL MEDIA?

- For CFA societies, a technology or marketing point-person is likely to be best positioned to manage the content on your social media accounts, as well as integration with your website
- Social media also presents an opportunity to involve society members who may be interested in social media, but are unable to do so at work because of regulatory restrictions
- Volunteers who help manage a society's social media presence may also be interested in becoming involved with society activities, events, and board service, so social media can serve as a development tool for new society leaders

LINKEDIN

LINKEDIN: A SOCIAL MEDIA STARTING POINT

Time Commitment

facebook

Hub for interaction
and engagement



Twitter: Dynamic source
of relevant content

LinkedIn

Social network for jobs,
professionals

LINKEDIN COMPANY PAGE

Low-maintenance way to maintain a presence on a large, professionally-focused social media platform.

Visit [linkedin.com/companies](https://www.linkedin.com/companies) to get started.

Share news, events, and information likely to be of interest to your audience

Post on a regular basis to build your audience

Engage with your audience by responding to comments, questions, and requests



CFA Institute is the global, not-for-profit association of investment professionals that awards the CFA and CIPM designations. We promote the highest ethical standards and offer a range of educational opportunities online and around the world.

Who We Are - We have more than 90,000 voting
... [more](#)

Company Updates

CFA Institute In October 2011 the Financial Accounting Standards Board (FASB) issued proposed guidance on how to value investment properties. But instead of providing guidance on how to measure investment properties held by any entity, the FASB created a new type of entity — the so-called... [more](#)
[Unfinished Work: Accounting Guidance for Investment Properties](#)
blogs.cfainstitute.org

In October 2011 the Financial Accounting Standards Board (FASB) issued proposed guidance on how to value investment properties. But instead of providing guidance on how to measure investment properties held by any entity, the...

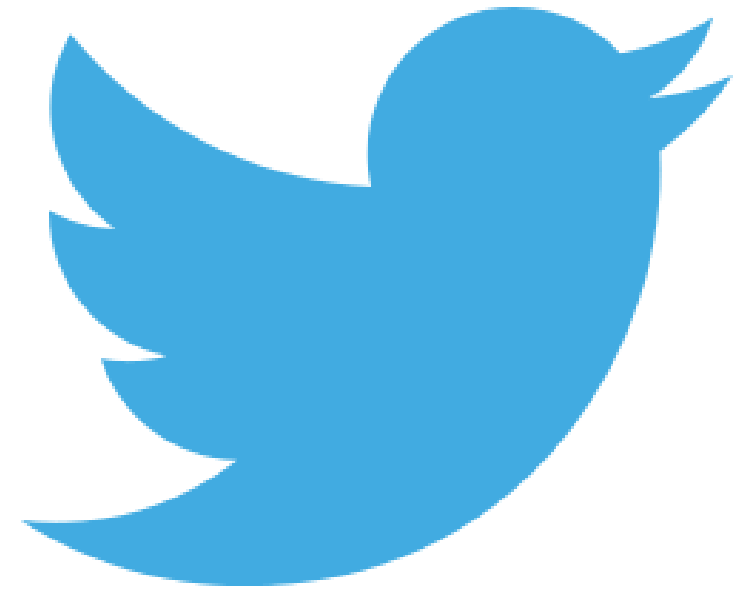
4 hours ago

CFA Institute Last week Fed Chairman Ben Bernanke once again warned Congress about the impending fiscal cliff. To be sure, there are a lot of perspectives on this issue and many players weighing

TWITTER

WHAT IS TWITTER?

- Twitter is an information network made up of 140-character messages called tweets.
- Messages from people and organizations you follow appear in a constantly-updated stream on your homepage.



“It’s like being delivered a newspaper whose headlines you’ll always find interesting – you can discover news as it’s happening, learn more about topics that are important to you, and get the inside scoop in real time.”

-Twitter

GET STARTED WITH TWITTER

Create your account: twitter.com/signup

1. Choose a @username that will appear with your tweets. We recommend using your first and last name, e.g. @MattOrsagh. Do not use CFA, CIPM, or Claritas in your username.
2. Upload a photo for your profile picture
3. Enter your first and last name. If you are a CFA Charterholder or CIPM certificate holder, this is the place to include ", CFA" or ", CIPM" after your name
4. Include a short, descriptive bio that helps others understand your background and interests.
5. For additional help, visit [Twitter 101: Getting started with Twitter](#)



FIND AND FOLLOW OTHERS

Discover information on Twitter by following people and organizations that share your interests, such as: news sources, subject matter experts, businesses, governments, NGOs.

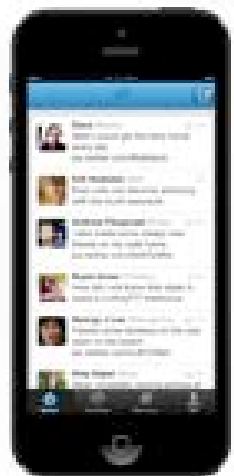
CFA Institute (twitter.com/cfainstitute) maintains lists of useful Twitter accounts organized by topic (e.g. Economics, Risk Management, Private Wealth) and tweets relevant content from CFA Institute on a range of topics including the Future of Finance (cfainstitute.org/FutureFinance featuring six streams of curated content on Financial Knowledge, Putting Investors First, Regulation & Enforcement, Retirement Security, Safeguarding the System, and Transparency & Fairness.)

Messages from others you follow will appear in a constantly updating stream on your homepage at twitter.com.

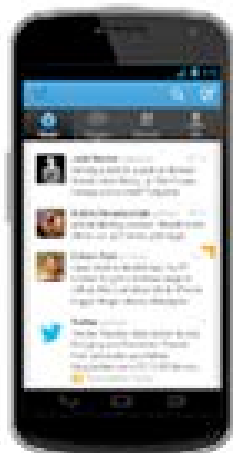


STAY CONNECTED WITH APPS

A variety of apps are available for mobile devices twitter.com/download



iPhone



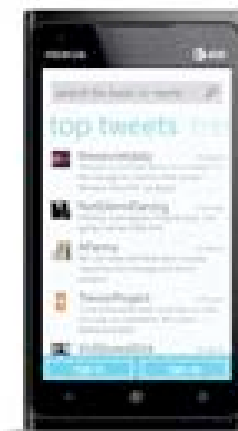
Android



iPad



BlackBerry



Windows Phone 7



Nokia s40

A WELL-CRAFTED TWEET

Tweet on a regular basis about news and information that you find relevant to your professional work or CFA society.

- When mentioning a person or organization, check to see if they have a twitter handle. If so, include it in your tweet, e.g. @CFAINstitute
- Don't use all 140 characters. Leave room for people to add a word or two about your tweet, or mention another relevant Twitter handle.
- Include a photo or video. This is especially useful at events, and made easy with a Twitter mobile app on your smartphone (Obtain copyright permissions where necessary).
- Use a hashtag to emphasize a particular keyword, topic, or event, e.g. #IIC12 (India Investment Conference).



PROMOTE EVENTS, PROGRAMS, DISCOUNTS

- Promote upcoming events of interest to your audience, and provide a link to register
- Include information about special programs and discounts likely to appeal to your audience
- Highlight key speakers, topics, and presentations
- Provide information about attractions and things to do at the event location



AUDIO/VIDEO

- Include audio or video whenever possible by linking directly in your tweet
- Services like YouTube, Vimeo, and SoundCloud will display audio or video directly in a tweet



USE #HASHTAGS

- When tweeting about a topic or event, include a hashtag. It's best to use no more than one or two per tweet.
- Search Twitter for the keyword(s) associated with your topic, and see which one is most often used by others. Include it, along with the # hash symbol, to help others find your tweets when they search
- You may wish to create a hashtag for a particular theme. For example, to promote a report on trust in the investment industry, CFA Institute included the hashtag #InvestorTrust.



IF YOU LIKE IT, RETWEET IT

- Retweet (RT) any tweets you find interesting, relevant or worthy of sharing with your followers.
- If you quote and modify the tweet when retweeting, let your followers know by using the letters MT at the beginning instead of RT
- Select reply if you would like to respond to a tweet with your own insight, perspective, or information.



SHARE WHAT YOU READ

- Share news items and articles that you find relevant, insightful, and valuable
- Select the  Tweet button (usually near the beginning or end of an article on most websites)
- A pop-up window will appear with the article title and URL. Make any changes you'd like (add hashtags, mention relevant Twitter handles, or remove any wording you think is unnecessary before publishing the tweet)



The screenshot displays the top section of The Economist's website. The header features the 'The Economist' logo in white on a red background, with navigation links for 'Log in', 'Register', and 'Subscribe' on a dark teal background. Below this, a horizontal menu lists various topics: 'World politics', 'Business & finance', 'Economics', 'Science & technology', 'Culture', 'Blogs', and 'Debate'. The main article is titled 'Concrete gains' under the 'Free exchange' section, with a subtitle 'America's big cities are larger than Europe's. That has important economic consequences'. It is dated 'Oct 13th 2012 | from the print edition'. Social media sharing options for Facebook (344 likes) and Twitter (131 tweets) are visible. A Twitter share pop-up window is overlaid on the page, titled 'Share a link on Twitter' and 'Share a link with your followers'. The pop-up contains the article's title and a shortened URL: 'http://econ.st/QZbtuC'. The CFA Institute logo is visible in the top right corner of the pop-up. At the bottom of the pop-up, it shows '14' and a 'Tweet' button.

SCHEDULE YOUR TWEETS

Tweeting often and regularly helps build your audience, but it can be time-consuming.

Here's an easy solution: use TweetDeck, a free tool from Twitter, to schedule and publish your tweets. Visit tweetdeck.com to set up your publishing queue.



LIVE-TWEET FROM EVENTS

Live-tweeting is a great way to share insights, ideas, and speaker quotes from conferences and other events.

You can also help increase your Twitter audience by live-tweeting a stream of useful information for people who are unable to attend the event but are interested in the topics being covered.

A good guideline when live-tweeting is to Tweet the insights, quotes, and ideas that most strongly resonate with you. Maintain a steady stream when live-tweeting, but don't overdo or underdo it. Tweeting every minute is probably too much; only one or twice an hour probably too little.

Check to see if the event has a Twitter #hashtag (usually in the conference program or on the interstitial slides between sessions). If it does, use the hashtag in your Tweets to help others easily find them.

Visit the [Live-Tweeting Guide](#) from Twitter for tips on Tweet timing, using hashtags, and other ways to make the most of your Twitter use at events.

FACEBOOK

FACEBOOK PAGE

Facebook requires a significant amount of time and resources to write, edit, package, and publish wall posts on a near-daily basis, which is necessary to build an audience. Think of it as an online publication, just like a blog, online magazine, or website.



CFA Institute
86,083 likes · 1,011 talking about this

Non-Profit Organization
The official page of CFA Institute, the global association for investment professionals that confers the CFA® and CIPM® designations, and is a

About Photos Likes Videos CFA Magazine

Highlights

CFA Institute shared a link.
21 hours ago

December 2012 Candidates: Understand your candidate responsibilities. Watch our video for more exam preparation tips (<http://bcove.me/7o2jvcjl>).

Are You Ready for the Exam?
bcove.me

Recent Posts by Others on CFA Institute [See All](#)

Jeffrey Richardson
For gold and silver news, videos, articles and who...
5 hours ago


Khalid Rahman
It would be of great help if any one can tell me , For...
2 · 17 hours ago

Amit Alok
CFA Institute...Is it necessary to pass individually in...

BLOGS

WHY BLOG?


- Attract prospects with insightful content and event highlights
- Provide access to educational content generated at conference sessions
- Enhance visibility and brand awareness

BLOGS

[All Blogs](#) [All Posts](#)

Enterprising Investor

373 posts



Can You Time the Markets Based on the Presidential Cycle? (Podcast)
11 October 2012
Rodney N. Sullivan, CFA, editor of the Financial Analysts Journal, cautions investors against trying to time the market against presidential cycles. [Read more](#) —

The Case of Empresas is Polar: Encouraging Whistleblowers Can Serve a Firm's Interest
11 October 2012

Live Webcast: Policy, Politics, and Bond Markets
10 October 2012


Melir Statman on What Investors Really Want: Lessons from Behavioral Finance (Video)
10 October 2012

The Norway Model: Lessons for Private Wealth Management
10 October 2012

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Inside Investing

34 posts



Discipline's Reward: The Power of Rebalancing
11 October 2012
The first three quarters of 2012 have been marked by handsome increases in stock prices, modest rises in bond and commodity prices, and generally declining stock market volatility. While these are welcome developments, investors should not get complacent going into ... [Read more](#) —

Fixed-Income Strategy: Are Bonds Poised to Be "Burnt to a Crisp"?
8 October 2012

The U.S. Presidential Election: Will It Impact Your Investment Portfolio?
4 October 2012


Is It OK to Keep Two Sets of Books? A Primer on Deferred Tax Assets
2 October 2012

How Can Asset Allocation Help You Reach Your Financial Goals?
1 October 2012

[View all Inside Investing posts](#) —

CFA Institute Annual Conference

114 posts



Singapore: Financial World Leader of 2022
8 October 2012
Singapore has made headlines for its increasing influence as a global financial hub, and delegates to the 66th CFA Institute Annual Conference will have a firsthand opportunity to learn from its successes. [Read more](#) —

Michael Woodford and Financial Fraud in Japan
11 September 2012

66th CFA Institute Annual Conference Delegates and Industry Experience
6 September 2012

Aswath Damodaran on Applying the Tools of Corporate Valuation
20 August 2012

Thomas Sargent Reviews American Responses for European Union's Crisis
23 July 2012

CFA Institute

CHECKLIST FOR EVENT BLOGGERS

- ✓ **Review past blogs** from CFA Institute for guidance on how to write for your own blog
- ✓ **Familiarize yourself with the conference agenda** and choose which sessions you want to cover
- ✓ **Arrive early** so you can get a good seat
- ✓ **Take notes** during your session to use later when writing your post. (If you are not a fast note-taker, consider using a digital recorder such as the one included on iPhone to capture audio from the session)
- ✓ **Greater detail on fewer points is better** than scant detail on lots of points
- ✓ **Publish** your post (we recommend roughly **500-600 words**). Be sure that your post has a sufficient level of detail (e.g. key stats, insights, key findings, etc.) so readers get solid takeaways

CHECKLIST FOR POSTS

Before you publish a post, does it:

- ✓ Have an attractive headline?
- ✓ Mention the name of event/ conference?
- ✓ Mention the name of organizer - society and other co-hosts?
- ✓ Capture key points made by the speaker(s) that could be of interest to investment professionals?
- ✓ Cite a few key statistics, particularly any forecast made by the speaker?
- ✓ Quote the speakers directly – act as a journalist who would while ensuring accuracy of the quotes?
- ✓ Include any additional learning resources (book, papers, websites, etc.) that speakers may suggest?
- ✓ Add hyperlinks where appropriate, such as to the homepage of the CFA society and CFA Institute?
- ✓ Include photos (files with high resolution)
- ✓ Include a link to your social media account or profile (if available)

ANALYTICS

ANALYTICS

Use TweetReach to analyze your reach, activity and exposure on Twitter

- You may use TweetReach to search your Twitter handle (e.g. @CFAasia) to understand your influence and activity on Twitter.
- Free report covers past 7-8 days, and Twitter is currently limiting most search results to tweets from the past 7-8 days

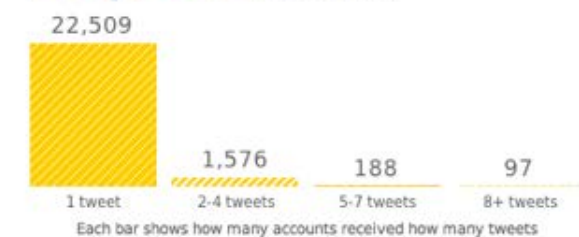
TweetReach Report for **@cfainstitute**

reach ⓘ

24,370
accounts reached

exposure ⓘ

28,158 impressions

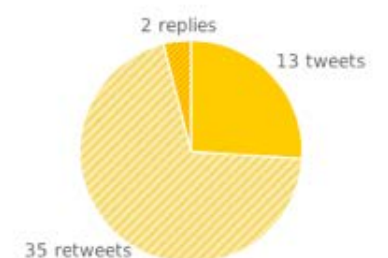


activity ⓘ

50 tweets

46 contributors

13 hours



ADDITIONAL RESOURCES

Sourcing CFA Institute Content

- [Future of Finance initiative](#) featuring six streams of curated content on Financial Knowledge, Putting Investors First, Regulation & Enforcement, Retirement Security, Safeguarding the System, and Transparency & Fairness.
- [Enterprising Investor blog](#)
- [Market Integrity Insights blog](#)
- [Inside Investing blog](#)
- [CFA Publications](#)
- [CFA Webcasts](#)
- [CFA Institute Research Foundation Publications](#)

Resources: Webcasts and Podcasts

- [Four Strategies for Building Your Professional Brand on LinkedIn](#)
- [Advanced Writing Strategies for Your LinkedIn Profile](#)
- [Developing and Managing Your Personal Brand Via Social Media](#)
- [Learn to Leverage Social Media to Enhance Your Career](#)
- [The Role Social Media Can Play in Managing Your Career](#)
- [Social Media Platforms Beyond LinkedIn](#)

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