



National Association of Estate Planners & Councils Considerations for Creating a LinkedIn Group

Many estate planning councils are considering a social media presence. The creation, maintenance, and monitoring of a LinkedIn group can provide many valuable benefits, both to the association and its membership.

LinkedIn Groups allow an association to:

- ✚ Quickly discover the most popular discussions in its professional arena
- ✚ Allow participants an active voice in determining the top discussions by liking and commenting
- ✚ Offer access to both member-generated discussions and news in one setting
- ✚ Convey the association's message

There are many considerations when starting this process, please use this guide as an efficient way to make the necessary decisions when creating your group.

Getting Started is Easy!

- ✚ Define your **goal(s)**... what is the expected outcome of this group?
 - Membership growth*
 - Member retention*
 - Engaging active members*
 - Added value for existing members*
 - Increased opportunity for communication*
- ✚ Create your group making sure to add a logo, website address, group description, summary, etc. (it is highly recommended that the group owner be a staff person for your EPC).
NOTE – this section can only be changed 5 times, please create the group carefully.
- ✚ Appoint or identify group moderators and managers, reliable volunteers or staff from the association who will post, maintain, monitor, or modify the group and its content. This job can be a combined volunteer / staff effort.

Decisions, Decisions, Decisions...

There are several key areas an association should carefully consider when creating their group. A thoughtful approach to these questions will ensure a positive social presence and member experience. LinkedIn offers many features that you may or may not wish to enable depending on the association's underlying goal(s).

Will your group be Open (anyone can join) or Members-Only?

This is an exceptionally important decision dictated by the previously defined goals.

How will you accept members into the group?

“Auto-Join” allows anyone be accepted into the group

“Request to Join” allows a group owner or manager to review and approve or deny requests

By invitation only





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Do you wish to enable the Discussions and News features?

Will you allow polls? If so, would you like to limit the creation to moderators or managers?

Will you allow the promotions feature (place in groups where members can promote their services, articles, offers and other things.) If so, shall a moderator or manager be the only people able to move a discussion to promotions?

Will you allow the jobs feature? If so, shall a moderator or manager be the only people able to move a discussion to promotions?

If content is flagged inappropriate by a member shall it be automatically removed? How many member flags will cause this to happen?

Permissions – What are members of your group allowed to do?

Freely post (discussions, promotions, jobs and comments)

Free to post promotions, jobs, comments only, and submit everything else

Free to post jobs, comments only, and submit everything else

Free to post comments only and submit everything else

Submit everything for approval

Will any of your members be restricted?

No

Require moderation for new group members. If so, for how many days?

Require moderation for people new to LinkedIn. If so, for how many days?

Require moderation for those with few or no connections? If so, for how many days?

Membership

Do you want your group displayed in the group directory?

Can members display the group logo on their personal profile?

Can group members invite others to join the group?

News Feeds

Do you want to add any news feeds to your group?

Templates

We strongly recommend creating the following templated messages as doing so keeps the potential group member “in the know” about the status of their request. A request to join is the first opportunity for one to experience your group and its capabilities – keep the communication open and timely for success!

Request to Join: If your group members must be approved, create a message that tells the requestor that their request was received, that it will be reviewed promptly, and that they can expect to hear back from the group manager within “x” days.

Welcome: This message tells those that have been accepted that they are now welcome to participate. It is strongly suggested that this message include a link to the group rules and/or include any restrictions on participation.

Decline: This message tells someone that they were not accepted into the group. Chose your words carefully!

Decline & Block: This message informs someone that they were not accepted into the group and have been blocked from participation.



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Recommended Policies, Procedures, etc...

There are several “must have” documents to manage a LinkedIn group. Here is a description of two of the most important.

Participation Guidelines: How are your members encouraged to participate in the group? Are there any special considerations (ex: licensing board restrictions, etc)? Please note, MJM Services can provide you with a sample document and an internet search will yield many quality sample documents.

Group Rules: Are there any prohibited activities (sales-based postings, marketing messages, recruitment, etc)? If so, create the policy and add it to your “group rules” section so that it appears to every member.

Editorial Calendar + Posting Schedule...

An editorial calendar is the single most important factor in the success of your LinkedIn group! This document outlines what will be posted by the association leadership, when it will be posted, and how often postings will occur. It will keep your volunteers “on track” and ensure that content is timely, relevant, and refreshed regularly, allows the association to communicate its message to the group members, and will encourage your members to actively participate. It is recommended that the editorial calendar span at least six months and in some cases a full year.

Maintenance... P · M · P · M

Publicize Maintain Post Monitor

When your group has been created, rules and guidelines have been adopted, templates have been created and the board is comfortable with progress, it’s time to get the word out!

Publicize: Let people know the group is available! There are several ways to accomplish this, depending on whether your group is open or closed.

Maintain: Make sure you are reviewing requests to join at least once per week. Remember, this is a participant’s first interaction with your social media presence – make it strong and meaningful!

Post: Post association-offered content based on your editorial calendar. Again, no less than weekly is best.

Monitor: Monitor postings for appropriateness and address any issues promptly.

Revisit...

Encourage the board of directors to revisit the association’s strategy regularly and perhaps yearly. The social world is changing quickly and you may wish to add, delete, or amend the existing strategy based on new developments or membership comments.

